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The historical research into school practice

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Bernat Sureda Garcia

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The historical research into school practice. Presentation

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ABSTRACT: This article is an introduction to a collection of papers that present new sources for the study of school and educational practices, such as school writings, teaching instruments, photographs, personal testimonies or teaching material catalogues. The key aspects of daily classroom activities are highlighted through the study of these diverse and numerous sources, which, until now, have been underestimated or scarcely considered. The last historical-educational research perspectives show us that we are in a thriving period in which research into the history of school practices is probing new resources and it is revising the contributions that all resources can offer, testing new processes for review and revision, combining various sources to analyze particular topics, and formulate more holistic interpretative models.

EET/TEE KEYWORDS: School practice; Educational practices; Teaching instruments; School heritage; XIXth-XXth Centuries.

Up to now, our understanding of educational history has basically been based on sources coming from administrations, political or policy-related sources, or sources providing theoretical discussions on how schooling should be carried out[1]. These sources often come up short or provide us with a warped understanding of models of schooling. In many cases, they overvalue social and political changes and assume that changes to educational practices necessarily stem from external changes or evolving policies and academic models.

This area of historical study has often used positivism as a lens, and not only has it focused almost exclusively on big ideas in pedagogy or on relevant institutions, but it has excluded many resources that were not considered to be pertinent. Until recently, and thanks to the field of social history, the main paradigm for such studies considered the development of school systems as a systematic process involving political interests, the construction of a national identity, or demands for economic progress. This interpretative model has hidden or obscured other dynamics in which the materiality of school practices and interventions with multiple subjects are key. Another shortcoming of this model is the dismissal of sources considered to be subjective or tainted by intentions to provide information that is uninterested in reality.

Recent historical-educational research has shown that the realities facing schools are relatively independent from other historical changes, and their evolution does not depend strictly on extra-curricular factors. In understanding the practice of schooling as a subsystem or dynamic conditioned by other factors, we generally value new sources. New evidence that can give us a more diverse view of schooling practices and that is made up of tangible records of such practices, serves to highlight key aspects of daily classroom activities and shed light on ideals, narratives, and behaviors different from those put forward by academics and those coming from policy reforms such as: teaching instruments and objects, textbooks, ABCs, photographs and other images, students' and professors' notebooks, student teachers' dissertations, teachers' reports and memoirs, and personal testimonies. Along this line, little attention has been given to publications in professional journals that provide descriptions of the practices and methods employed by teachers.

Formed in 2017, the History of Education Research Group at the University of the Balearic Islands has collaborated with other researchers from various universities and has received public financing to carry out research related to educational practices in Spain throughout the 20th century via the rarely used sources mentioned above. Specifically, we work under the framework of the ongoing project titled *School practices and culture in the 20th century*

[1] The monographic presented has been coordinated and carried out under the framework of the project titled *School practices and culture in the 20th century*, EDU2017-82485-P, financed by the Spanish Ministry of Science, Innovation and Universities (MCIU); the State Research Agency (AEI); and the European Regional Development Fund (ERDF, EU).

(EDU2017-82485-P, MCIU, AEI, FEDER/EU). Some of the preliminary findings of this project were presented in a seminar about reflections on the sources behind historical research into school practices, that took place during the international congress titled «Educational Practice: History, Memory, and Heritage» (*VIII Jornadas Científicas de la SEPHE, I Congresso Nazionale della SIPSE*), celebrated in Palma Mallorca, 20-23 November 2018. In this seminar, we presented and discussed the wide range of records available for conducting a historical study of school practices, addressing each of the sources' unique characteristics and usefulness and providing information on the conservation of these sources and on how to find them.

In the present monographic issue, we provide this and other more detailed contributions. Articles show that we are in a period in which research into the history of school practices is not only probing new resources, but is revising the contributions that all resources can offer, testing new processes for review and revision, combining various sources for analyzing particular topics, and formulating more holistic interpretative models.

In his article, Juri Meda reviews the approaches taken by research conducted on writings coming from students in order to come up with new approaches that are not confined to using these sources to gather information from students about events that took place outside of the school but also to recognize that these documents present testimonies of daily educational practices in schools. Using students' writings to gauge school culture means shifting the interest in the spontaneity of these texts – as evidence of their ability to show us students' susceptibilities and opinions – to their use as samples of school practices in general, where both spontaneity and imposition exist at the same time.

In their article, Sergi Moll and Bernat Sureda combine two sources that provide us with a vision of the school from within: student teachers' dissertations and personal testimonies. Information on religious schools that appears in student teachers' dissertations is compared with testimonies given by former primary school students from the same period. Their article demonstrates the possibilities that can arise from cross-checking different sources. Along this same line of reviewing the critical and interpretative frameworks that we use to address the various resources that paint a picture of daily educational practices, Vera Lucia Gaspar de Silva and Gizele de Souza use school objects as another piece of evidence in understanding daily educational practices. In their article, they aim to extend the historiographical approach to these objects – as in the case of other sources – by considering not only individual objects, but rather the objects in the contexts of their production, circulation, and appropriation, as a way with which to address them as constituent and participatory elements in educational and school practices. The article by Pedro Luís Moreno and José Pedro Marín also focuses on school materiality. Using commercial catalogues, they study – considering production and distribution – the materials on offer for teaching natural sciences. The impact of teaching resources and school materials

on educational practices, and especially on literacy and written culture, is a topic that is analyzed in the article written by Maria Stephanou and Mariana Venafre Pereira de Souza, in which they study a set of illustrated ABCs produced in France and Brazil during the 19th and 20th centuries that were designed to teach students to read and whose central focus is on the animal kingdom.

Trade press has received attention over the last few decades, being the focus of a variety studies, inventories of various publications, and monographs on certain kinds of publications. In their article on the journal «El Magisterio Balear» (1873-1916), Francisca Comas and Sara González address the information provided in such press to offer an understanding of daily educational practices. Articles written by teachers concerning their practices are windows through which we can better see the real situation in schools. And they are produced in parallel with and have a dialectic relationship with other discourses, e.g., official and academic.

Photographs represent one of the sources that has been reconsidered as being valuable to the study of school culture and daily life in the school. In her work, Maria Augusta Martiarena explores this iconic resource to place school practices in the framework of the study of school institutions and provides evidence of the way in which photography and sets of photographs used by institutions show not only actual daily life, but idealized or sought-after realities. That which they attempt to publicize or make known via images and text also helps us understand the shaping of the school culture that was considered to be proper during a specific time period or by a specific group. Visual resources are also present in the study by Sylvain Wagnon on filmstrips and their relationship with processes of updating teaching. His article shows how apparently innovative elements can be integrated into the school culture with neutral, rejuvenating, or traditional ends. The article also suggests that it is the teacher's attitude that gives materials one purpose or another in terms of the overall educational practices in the school and in the classroom. The way in which school practices were presented in news broadcasts during the Franco dictatorship in Spain is addressed in the article by Josep Casasnovas, Núria Padrós, and Eulàlia Collelldemont. These broadcasts, which were required to be played in cinemas before films, provide evidence of the transformations that took place in educational practices throughout the period.

School textbooks have been one of the main points of study in this field, though such analyses do not always consider their function as a teaching resource in the framework of a specific school practice. In their article, Llorenç Gelabert and Xavier Motilla study textbooks and other school materials related to updating the teaching of music in Catalonia and Spain in general, as well as their relationship with implementing the method proposed by Ireneu Segarra, musicologist, pedagogue, director of the Montserrat choir, and follower of popular-music-based teaching systems, especially that of Zoltán Kodály.

Finally, we close with two articles that consider written resources for studying school practices that, until now, have been infrequently used in research into the history of schooling. In their article Carlos Menguiano, María del Mar del Pozo, and Gabriel Barceló explore the information provided by candidates for directors of schools in their memoirs on their teaching experiences in the 20th century. The texts analyzed correspond to two very different political time periods: the Second Spanish Republic and the Franco dictatorship. Lastly, Paulí Dávila, Luis M. Naya, and Joana Miguelena analyze the contribution of a large number of yearbooks published in private religious schools to the study of school practices.

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School writings as sources for the study of teaching practices: the Italian case (1925-1945)*

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ABSTRACT: Over the last twenty years, the historians of education who investigated the heuristic potential of school writings tended to focus on extraordinary historical periods (such as wars and revolutions) and to use notebooks and diaries not as sources able to describe how wars and dictatorships adulterated educational processes and teaching practices commonly promoted at school, but as materials to be used to tell how wars and dictatorships upset the lives of small protagonists in their school life or as unintentional written witnesses about social and political changes. Hence, the obsessive search for spontaneity as a guarantee of the reliability of the source, able to witness in a more natural and genuine way what was happening outside school and/or how this affected children's lives inside school. This polarization generated a prevailing interest in what Davide Montino called *disciplined writings*. Starting from this assumption, this study tries to recover the *production rejects* of the strict selection process to which historians subjected these sources in search of the rare cases of evident spontaneity, and to re-evaluate them on the basis of a different interpretative parameter, that is reading their rhetoric, repetitiveness and stereotypy not as negative elements, but as real markers of a widespread teaching practice.

EET/TEE KEYWORDS: History of school; History of teaching; School writing; School notebooks; XXth Century.

* This work forms part of the project *School Culture and Practices in the 20th Century*. EDU2017-82485-P. Funded by Ministry of Science, Innovation and Universities (MCIU); Spanish State Research Agency (AEI); European Regional Development Fund (ERDF, EU). It was translated into English by Antonella Di Pasquale.

Preface

In the report at the 1st Italian-Spanish Workshop on the History of School Cultures (Berlanga de Duero, 2011), where Roberto Sani introduced an *excursus* about the historiographical reflection on school writings carried out in Italy over the last decade, he stated that one of the historiographical issues still to be resolved in this field was not *disciplined writings*, but as an indicator for the degree of «incidence in educational and cultural mediation carried out by schools for the benefit of pupils and their imaginary in creation»[1].

I start from this observation, because I believe it was one of the few public interventions where the heuristical faculties of the *disciplined writings* have ever been defended – although under certain conditions –. In fact, this particular genre of school writings, masterfully described in its specificity by the late Davide Montino in his works, has always remained on the margins of historical research in education, which privileged the true or presumed evidence of the expressive spontaneity of a child and/or even his subjectivity in the vast sea of a school written production[2].

After carrying out numerous research on children's graphic expressions (both written and iconic ones) and comparing the results of a scientific production at an international level[3], I believe it is time to recover the production waste

[1] R. Sani, *Bilancio della ricerca sui quaderni scolastici in Italia*, in J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España: balance y perspectivas*, Macerata, eum, 2013, pp. 83-103 (quotation p. 95).

[2] See *La scrittura bambina. Interventi e ricerche sulle pratiche di scrittura dell'infanzia e dell'adolescenza*, a monographic number of «Materiali di lavoro: rivista di studi storici», n. 2-3, 1992; Q. Antonelli, E. Becchi (edd.), *Scritture bambine: testi infantili tra passato e presente*, Rome, Laterza, 1995.

[3] We refer in particular to the studies carried out by Anne-Marie Chartier (*Travaux d'élèves et cahiers scolaire: l'histoire de l'éducation du côté des pratiques*, in *Etnohistoria de la escuela. XII Coloquio Nacional de Historia de la Educación (Burgos, 18-21 de junio de 2003)*, Burgos, Universidad de Burgos – Sociedad Española de Historia de la Educación, 2003, pp. 23-41), Antonio Viñao Frago (*Los cuadernos escolares como fuente histórica: aspectos metodológicos e historiográficos*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 13, 2006, pp. 17-36), Antonio Castillo Gómez and Verónica Sierra Blas (A. Castillo Gómez, V. Sierra Blas (edd.), *Mis primeros pasos. Alfabetización, escuela y usos cotidianos de la escritura (siglos XIX-XX)*, Gijón, Trea, 2008; A. Castillo Gómez, *Educação e cultura escrita: a propósito dos cadernos e escritos escolares*, «Educação», n. 1, 2012, pp. 66-72), Ana Chrystina Venancio Mignot (A.C. Venancio Mignot (ed.), *Cadernos a vista: escola, memoria e cultura escrita*, Rio de Janeiro, Universidade do Estado do Rio de Janeiro, 2008) and María del Mar del Pozo Andrés and Sara Ramos Zamora (M. del Mar del Pozo Andrés, S. Ramos Zamora, *El cuaderno de clase como instrumento de acreditación de saberes escolares y control de la labor docente*, in *La acreditación de saberes y competencias. Perspectiva histórica*, Oviedo, Universidad de Oviedo – Sociedad Española de Historia de la Educación, 2001, pp. 481-501; M. del Mar del Pozo Andrés, S. Ramos Zamora, *Los cuadernos de clase como representaciones simbólicas de la cultura escrita escolar*, in *Etnohistoria de la escuela*, cit., pp. 653-664) or, more recently, the ones by Ana María Badanelli and Kira Mahamud (A.M. Badanelli, K. Mahamud, *Posibilidades y limitaciones del cuaderno escolar como material curricular: un estudio de caso*, «Avances en supervisión educativa», n. 6, 2007,

of the rigid selection process, to which those who have worked with school writings up to now have subjected these sources to the search for the rare cases of evident spontaneity/subjectivity of the writers and to re-evaluate them on the basis of a different interpretative parameter, that is, reading their rhetoric, repetitiveness and stereotypy (which are undoubtedly the main deterrent for this kind of studies) not as negative elements, but as real markers of a widespread teaching practice.

This does not mean that those who have worked with school writings so far have done useless work, but more attention has been fundamentally paid to a genre of writings (*spontaneous* and/or *subjective*, or presumed ones) rather than to the others (the *disciplined* ones), which are less stimulating, but equally profitable in historiographical terms. In this sense, today the recovery and analysis of *disciplined writings* seems indispensable for scholars who are interested in orienting their studies towards the history of teaching and educational processes, as well as the history of school, and – just for this – they intend to study not only school writings, but as the results of a precise educational process, aimed at learning the writing rudiments by a constantly growing school population between the late nineteenth and the early twentieth centuries.

It is also necessary to look at this school population and the social composition to fully understand the intimate nature of school writings.

1. *Learning to write in the context of the mass literacy*

The phenomenon of literacy turned into a mass cultural process during the contemporary age, when the ability to read and write began to be conceived as the basis of a broader and more complex educational process, as the extension of schooling processes to a growing number of boys and girls from all the social classes – which developed in all Western countries between the late nineteenth century and the early twentieth century – required standardized teaching devices,

pp. 1-16; A.M. Badanelli, *Cuadernos de rotación, cuadernos de deberes: un estudio comparado*, in J. Meda, D. Montino, R. Sani (edd.), *School Exercise Books: a Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, Florence, Polistampa, 2010, pp. 793-802; K. Mahamud, A.M. Badanelli, *El cuaderno escolar como objeto de estudio: una aproximación a los avances metodológicos en manualística*, in J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España*, cit., pp. 201-224), who namely analyzed the disciplined writing practices in the class diaries written at school in the early years of Spanish Francoism.

such as manuals and text books, whose correct use was subjected to the full domain of reading techniques. A model whose objective was not the humanistic education of a numerically limited intellectual class, but the acquisition of some fundamental skills (i.e., reading, writing and counting), which were essential to ensure a massive reception of increasingly complex communication policies, formulated by a ruling class – such as the modern bourgeois parliamentary democracies – who needed to broaden their political consensus as much as possible.

In this sense, it is interesting to verify what kind of writing was taught in this «mass school», whose task was to ensure the learning of some fundamental skills for its students. Like all mass phenomena, this school was based on criteria of productivity and economy, which were also applied to educational processes, where it was necessary to maximize the usefulness of the resources used and to determine their effectiveness over time (ratio between the result obtained and the objective prearranged) and efficiency (ratio between resources consumed and results obtained) – just like in production processes –.

Therefore, educational processes in this school were strongly subordinated to the achievement of some fundamental results and, in order to enable it, they need to resort to increasingly effective and efficient educational devices (recently, defined as «tools of mass education»[4]), which were designed to capitalize at best the educational mediation carried out by them and, thus, to reach the largest possible number of users (i.e., the students).

For this reason, the children who attended this school were taught to write in a very simple and stereotyped way, proceeding to primary literacy and providing a kind of «written expressive repertoire», on which they could draw according to the concrete daily needs of the people belonging to the popular classes, how to sign documents, to write short messages to their dear ones from the front, the prison or abroad and so on.

It was precisely for this reason that an extraordinary importance was given to style rather than content, to calligraphic practice rather than written expression, because handwriting had to be as clear as possible and understandable to everyone[5]. Ultimately, the popular one (and most of the national school population until at least the advent of the so-called «affluent society» between the 1950s and 1960s was popular) was a practical literacy, based on writing for daily use, aimed at a few simple and concrete needs. The demonstration of unfamiliarity with the word written by popular classes outside a school context, especially in rural areas, is well represented by two phenomena. The first one is

[4] J. Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milan, FrancoAngeli, 2016.

[5] See F. Ascoli, *I quaderni, strumenti per una storia della scrittura scolastica nel periodo postunitario*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 13, 2006, pp. 99-118; Id., *Il quaderno come corredo pedagogico nell'insegnamento della scrittura e della calligrafia*, in Meda, Montino, Sani (edd.), *School Exercise Books*, cit., pp. 1007-1020.

the diffusion of a collective reading practice within subaltern cultures (especially the rural ones), where the figure of a balladeer was institutionalized and was generally the best literate man of the community, who read aloud popular (but also religious) literature to their community people, who progressively tended to lose the few rudiments of primary literacy assimilated at school in this way. The second phenomenon is a lack of calligraphic evolution in the medium and long term of popular writers, whose handwriting generally remained the elementary handwriting learned and practiced at school for all their lives rather than evolving it in cursive writing, as undoubtedly attested not only by official documents (signatures on cadastral deeds, wills and registers of births), but also popular letters. Writing was an exceptional event, an activity occasionally practiced by popular classes only in case of extreme necessity; for this reason, therefore, its teaching in public schools was more oriented to let them learn the correct composition of graphic signs rather than to express their own thoughts and emotions (i.e., the elements which would have contributed to make a writing more subjective and less impersonal, or more spontaneous and less disciplined). In this sense, it is possible to state – only for this context – that calligraphy and spelling had much more importance than grammar and syntax, which are useful to refine expressive manifestations from a stylistic point of view.

It was in this historical and social context that the contact between childhood and written culture took place for the first time on a large scale. For this reason, we can state that the 'great mediator' between childhood and written culture was school. And, still in this sense, we can also state that the children's written culture is fundamentally a school culture, the result of an exogenous process to the child's nature, who has only developed verbal and pictorial-graphic communication when he/she entered school (although, if we want to socially and historically contextualize this statement, it is necessary to specify that children from popular classes were able to develop only verbal communication, although often only the dialectal one, due to the fact that the pictorial-graphic communication presupposed materials and tools, which were superfluous goods for this class)[6].

Until childhood was rediscovered as a creative subject with a pedagogical activism in Italy (the artist-child in the drawings done by Giuseppe Lombardo Radice in «Athena Fanciulla»[7]), the average pupil was not only seen as a recipient

[6] This does not prevent there can also be proofs written outside school. Without doubts, they are episodic and exceptional writings, such as the greeting letters sent to parents on some particular occasions or the ones sent to Santa Claus to ask for gifts – starting from such a moment –, as well as diaries and *album amicorum*. However, it cannot be stated that children are generally more spontaneous – both on a stylish level and on a content one – when they write outside the school context, because they always write to an adult and begin to really feel the need to write about themselves and to express their ideas and emotions in writing (for example, in diaries) after puberty.

[7] G. Lombardo Radice, *Athena fanciulla: scienza e poesia della scuola serena*, Florence, Bemporad, 1925.

and a co-protagonist of the educational process, but it was widespread that knowing how to read and write would not have been very useful in his/her life. Ultimately, the aim was not at training *writers*, but (more or less experienced) *people who can write*, to whom expressive virtuosities would have been never requested, but rather learning some practical writing formulas to be memorized and used on some rare occasions of direct relationship with authorities and/or the – increasingly less rare – occasions of uprootedness from family and social context where one was born because of war, imprisonment and emigration[8]. For this reason, Lombardo Radice wrote in his «Lezioni di didattica e ricordi d'esperienza magistrale»:

> The school does not want to make 'writers', but to educate young people to be good, to know the things they studied well, to talk about things they know well, not to say twenty words where five would be enough, or to hurry with five where it needs twenty: to know how to weigh their strengths and to have a sense of their own responsibility, so when they speak as when they write; to have that finesse and graceful style which arise from the continuous care of being sober and ready to induce one's persuasion in others. Even writers will come out of a similar education, precisely because we do not untimely put ourselves up to make them writers![9]

Up to a certain point, writing was an indispensable tool of public rather than private communication for popular masses, an expedient for the acquisition of many political rights on the one hand and a main vector of requests addressed to political power through the public administration on the other hand[10]. Not by chance, therefore, in this historical context, there was a more imposing, extremely rhetorical and stereotyped praxis at school, which often recurred even to mnemotechnical stratagems to let future writers remember the few effective writing formulas, which would have been actually useful for them in their lives, because in this moment the distinction between writing as a tool and writing as an art is still very clear, unlike today when we have reached a full interpenetration of these two levels. If this context is not taken into account and such teaching practices are not only ascribed to those times' educational traditions, I believe we cannot understand the problem in all its complexity.

[8] Therefore, school writings preluded to some extent popular writings, whose study – in particular, promoted by Quinto Antonelli, Antonio Gibelli and Emilio Franzina – was fundamental for the research development on children's writings, initially interpreted more as narrative sources (such as letters written by soldiers and emigrants or autobiographical diaries) rather than other. In this sense, it is no coincidence that Davide Montino, who more systematically studied school writings from a historical perspective, was mentored by Antonio Gibelli.

[9] G. Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, Palermo, Sandron, 1913, p. 98.

[10] On these aspects, see D. Marchesini, *Il bisogno di scrivere: usi della scrittura nell'Italia moderna*, Rome, Laterza, 1992.

2. *From «practical writing» to «expressive writing»: the evolution of school writing and its causes*

It is to be defined when the transition from a more practical form of writing to a more expressive one with a strong narrative component is produced at school. We consider that this process began with the advent of the above-mentioned 'affluent society' between the 1950s and 1960s, when there was an already largely literate society in Italy – by virtue of the school policies promoted in the previous years – and, therefore, children were taught not only to write, but to express themselves through writing. This phenomenon was an indirect consequence for the abandonment of the rural world and the expansion of service sector, which promoted the access to secondary education to a growing number of young people, who had to develop more complex skills than the three fundamental ones (reading, writing and counting), provided by the previous primary school. The drop-out rate in primary school had strongly come down, also due to the sharp reduction in the widespread practice of child labour through more restrictive legislative constraints, but also the mechanization of agricultural work, which did not make the seasonal employment of low-cost labour necessary anymore, thus indirectly ensuring to school a greater continuity in its teaching practices and the possibility of completing its curriculum, subject by subject, going really deep.

Therefore, the school began to take more and more care of written expression, despite a strong disciplining continued to persist in the methods of acquisition for this fundamental competence – in a school, which continued to be conceived to meet the above-mentioned needs of productivity and efficiency –. However, the increasing attention paid to a more precise and refined written expression did not imply the opening to more spontaneous and subjective forms of writing, as they kept placing style at the centre rather than contents, which were often imposed by the teacher and not responding to the real interests of the students.

Primary school after World War II continued to be delegated to a mass literacy process, on the other hand. It was a school which still took little account of the considerable results achieved by pedagogical activism throughout the country (already in the 1930s, but with increasing incisiveness since the 1950s), which distinguished itself from mass school, especially in relation to the promotion of children's free expression. Mario Lodi case is emblematic in this sense, as he sought to replace the «copier-repeater-boy»[11] moulded by his predecessors with a boy who could freely express himself in various styles, which his teacher was able to make available to him in classroom, such as individual and/or collective written composition, inter-school correspondence, free story and spontaneous drawing. Making the most of their spontaneity and creativity, the

[11] This expression is used in M. Lodi, *C'è speranza se questo accade al Vho: pagine di diario*, Milan, Edizioni "Avanti!", 1963, p. 16.

pupils from Vho primary school in Piadena began to talk about themselves, their experiences, needs, expectations, the things they loved or hated doing.

Other didactical experiments aimed at the children's expressive release are known and carried out in those years in the wake of the spread for Freinetian techniques; however – from a quantitative point of view – this pedagogical movement had a relatively low incidence and never succeeded in proposing – in numerical terms – a real alternative to mass school. However, it succeeded in having a positive influence on the practices of teaching writing in «real schools», moving their centre of gravity to the development of expressivity rather than the sterile conformation to predefined canons.

In this school context, it is possible to place the development of the *personal writings* introduced – with different levels of incisiveness – by Davide Montino in the historiographical debate in 2007, i.e. «those writings which reinterpret, break schemes and stereotypes, use linguistic and rhetorical materials in a creative way, as well as ideas and values provided by school and adults»[12].

Montino's reflection is undoubtedly extremely meaningful, since the adjective *personal* refers both to the stylish aspect and the contents of school writings in it, i.e. the little writers' real experiences of life (inside and outside school), that is a child author, who could not use them until a certain stage to learn the process of 'knowing how to write' in his/her artificial and impersonal school writings, which often referred more to hypothetical situations (proposed in order to build an ethical and behavioural case study which the student must follow) rather than real ones. The real revolution came when the child was able to talk about what he liked and was interested in, although perhaps it was never completely spontaneous because of the real or possible conditioning induced by an adult judgment, which was able to automatically arouse in the child the desire for complacency and to determine his/her self-censorship at an expressive level.

On the other hand, the child can write about himself/herself at best, but never for himself/herself, because writing is not for him/her – unlike for the adult – the preferential means of narration about himself/herself for himself/herself and the others yet, which is instead the oral means, orality. The child directly talks about himself/herself and his/her desires to the adult, without the need for written mediation, which is an adult imposition (in this sense, Christmas letters are a real example of 'writing canonization').

Then, it is possible to affirm that – up to a given moment to be defined with precision – a child is always a 'forced writer', who writes because he/she has been obliged by an adult (teacher) or he/she intends to please him/her using a communication channel which enhances one's education and maturity (parents and/or relatives).

12 D. Montino, *Da scolari a bambini? Scritture disciplinate e scritture personali nei quaderni di scuola*, in Meda, Montino, Sani (edd.), *School Exercise Books*, cit., 2010, pp. 1289-1303.

For this reason, with the exception of a few evident cases, it is difficult to find traces of spontaneity and subjectivity within this writing genre, because the expressive and – so to speak – narrative urgency is channelled at the request of an adult through a medium which is not for children, has not the immediacy of speech and forces a child to narrate some aspects of his/her daily life, almost without any intention: he/she is asked to do it and must do it, but he/she does not feel the intimate need to do it. Therefore, the text produced does not correspond to a real narrative urgency, which is spontaneously expressed through orality.

Ultimately, there comes a time when a child begins to speak not so much about himself/herself (not to attribute to writing any organizing function for his/her mental structures and/or inner analysis), but about his/her personal experiences, although always at the request of a teacher and not based on the claim of any expressive autonomy.

The hypothesis which we can therefore advance – also in the light of previous reflections – is that if style is disciplined, this does not apply to content, which is de-disciplined passing from impersonal contents, which are extraneous to direct childhood experience, to personal contents, which have been already experimented or can be concretely experimented by the writer.

For this complex series of reasons, it is now unavoidable to reverse the perspective from which we have analysed this source so far and, at the same time, to extend the spectrum of sources which can be used beyond it to determine the training processes underlying the learning to write, as Anne-Marie Chartier, Jean Hébrard and Antonio Viñao Frago tried to do abroad[13]. Up to now, in fact, we have always started from the results (i.e. writings) rather than from the intentions and influences underlying them, which consisted of inveterate teaching practices among teachers, actually adopted by them in a classroom, on the one hand and the general guidelines for curricular teaching in school curricula and ministerial circulars, which have never been systematically analysed previously on the other hand[14]. Furthermore, we cannot also avoid taking into consideration many writing compendiums and anthologies of writing models (from the well-known collections of written issues to forms of letters, recently studied by Fabio Targhetta[15]), as well as teaching advice columns published in various teachers' magazines, which all – like the above-

13 A.-M. Chartier, J. Hébrard, *Lire pour écrire à l'école primaire? L'invention de la composition française au XIX^e siècle*, in Y. Reuter (ed.), *Les interactions lecture-écriture*, Bern, Peter Lang, 1994, pp. 23-90; A. Viñao Frago, *Del garabato y los palotes a la escritura: notas sobre la génesis y el concepto de preescritura*, «History of Education & Children's Literature», vol. VII, n. 1, 2012, pp. 45-68.

14 On this regard, it will be useful to remember that Davide Montino identified a watershed in the school curricula written by Giuseppe Lombardo Radice in 1923.

15 See F. Targhetta, *"Signor maestro onorandissimo": imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, Turin, SEI, 2013. Luisa Tasca had already dealt with this topic in one of her articles: L. Tasca, *La corrispondenza "per tutti". I manuali epistolari italiani fra Otto e Novecento*, «Passato e presente», n. 55, 2002, pp. 139-158.

mentioned school curricula – influenced the real teaching practices, which cannot be ignored.

3. *School writings: new sources for a history of school teaching*

The previous considerations lead us to re-evaluate the heuristic faculties of disciplined writings and the possibility of their use in the historical research in education. If the need to submit sources to a rigorous exegesis appears shareable, defining their level of originality and reliability and distinguishing between spontaneous and disciplined writings, the process which over time has led to the recognition of a presumed cultural primacy of spontaneous writings compared to the disciplined ones – unable to aspire to the dignity of sources – appears less shareable. Therefore, the time has come to trace this indispensable distinction back into the bed of the correct exegesis of sources rather than in their strict distinction between good and bad ones, useful and useless ones.

It seems that up to now we have exclusively concentrated on the final product, that is children's writing, and not on its 'production chain', i.e. the almost exogenous process which – in the context described above – led the illiterate young boy to become a young writer by the means of the educational mediation, especially carried out by the teacher through disciplined writings and, even earlier, through those simple pre-writing exercises which were often vilified and marginalized by historiographic research as they were considered manifestations of an authoritarian school whose epistemological status had to be contested, even if the process we tried to outline cannot be removed from its historical context.

A weak point of the historiographical reflection on school children's writings carried out at the turn of the twentieth and the twenty-first centuries – already focused by Agustín Escolano Benito in the final round table at the international symposium «School Exercise Books: a Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries» (Macerata / September 26-29, 2007) – was to attribute the dignity of sources for historical-educational research only to spontaneous written compositions and not to sentences, dictations and, more generally, all those written compositions which made up the varied textual category produced in the context of writing exercises. The latter ones are textual categories where the expressive need is overcome by the application one, as the main concern of the apprentice writer is to practice writing more than to narrate by writing. This is if we confine ourselves to exclusively learning to write. However, if we extend our reflection to all the disciplines of a school curriculum, we immediately realize that there is a wide range of textual categories which can be included in the wide spectrum of the school written exercises, such as the geographic, historical

and/or mathematical ones, intended to «reorganize knowledge by writing it» – as Anne-Marie Chartier cleverly explained in an article in 2009 –[16]. These exercises are available in the notebooks where we have only looked for the written compositions, which appeared as spontaneous as possible, ignoring everything else for many years[17].

During the keynote address which opened the international conference «Escrituras infantiles: homenaje a Davide Montino» (Berlanga de Duero / September 6-7, 2011), Antonio Viñao Frago brought the international scientific community's attention back to it, by analysing the evolution for the exercises of pre-writing and introduction to writing during the contemporary age and by putting their study more on the history of teaching than on others[18]. In a parallel direction, there are the studies carried out by the linguist Luisa Revelli in the context of CoDiSV project[19], which are about the evolution of teaching Italian at school and the forms of 'scholastic Italian'[20] in a border region, such as Valle d'Aosta[21].

If we really intend to follow further ways of research, it is necessary to give up a series of interpretative stereotypes introduced by culture historians – who had the merit of inaugurating this line of studies on the one hand and the responsibility of placing a hard historiographic mortgage on it, imposing its own particular interpretative categories on the other hand – and to find an original interpretative figure to be applied to this kind of sources, by elaborating an historical-educational line for their study and by scientifically accrediting it.

This 'line' should recover the reflections formulated by Dominique Julia in the late 1990s[22] regarding school cultures and, consequently, it should promote works which propose not to only interpret these sources on the basis of the categories of *spontaneity* and *discipline*, but also on the basis of the synthesizing *training* one (understood as a result of child personal tension and

16 A.-M. Chartier, *Los cuadernos escolares: ordenar los saberes escribiéndolos*, «Lectura y Vida», n. 3, 2009, pp. 6-18.

17 The French colleagues (the above-mentioned Chartier and Hébrard) and the Spanish ones (María del Mar del Pozo Andrés and Sara Ramos Zamora) have paid more attention to the multidisciplinary didactic content of school writings.

18 A. Viñao Frago, *Del garabato y los palotes a la escritura: notas sobre la génesis y el concepto de preescritura*, «History of Education & Children's Literature», vol. VII, n. 1, 2012, pp. 45-68.

19 <http://www.codisv.it/en/index.cfm/project.htmln> (last access: 15.01.2020).

20 The term *Italiano scolastico* (scholastic Italian) is used to define the Italian language learnt at school and used in that context by the poorly literate and dialectophone children of the lower classes.

21 L. Revelli, *Tra il detto e il taciuto: omissioni ed emendamenti linguistici negli scritti infantili d'inizio Novecento. Il caso della Valle d'Aosta*, in Meda, Montino, Sani (edd.), *School Exercise Books*, cit., pp. 1165-1178; Ead. (ed.), *Scritture scolastiche dall'Unità ai giorni nostri: studi e testimonianze*, Rome, Aracne, 2012; Ead., *Diacronia dell'italiano scolastico*, Rome, Aracne, 2013.

22 D. Julia, *La culture scolaire comme objet historique*, in A. Nóvoa, M. Depaepe, E.V. Johanningmeier (edd.), *The Colonial Experience in Education. Historical Issues and Perspectives*, Ghent, Paedagogica Historica (Supplementary Series, Vol. I), 1995, pp. 353-382.

adult disciplining) on the one hand and to broaden the spectrum of children's school writings to various teaching written exercises, the unique sources for the explanation of real teaching practices used for the mediation of the above-mentioned school cultures, on the other hand. Basically, school writings should be taken into consideration not only as school chronicles and witnesses of the facts of which the schoolboy/schoolgirl was the protagonist or he/she indirectly attended, but also as his/her stunted exercises, aimed at refining his/her linguistic and expressive skills and more.

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Private religious schools for boys in the Spanish post Civil War period: an analysis through triangulating historical sources*

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ABSTRACT: This research offers a triangulation of historical sources to look into day-to-day life at private religious schools for boys in the post-Civil War period in Spain (1939-1945). The article will compare information from other studies on these schools with information provided by a new source: the testimonies of former pupils. The text offers a comparative analysis between the recollections of former pupils from certain schools and the reports that teacher training students wrote on the same schools on their placements there during the time the interviewees were pupils. The work aims to provide information on a little-known topic: educational practice at private religious schools. In turn, it reflects on the features and value of the historical sources used.

EET/TEE KEYWORDS: Private school; Oral testimonies; Trainee reports; Religious orders; School culture; XXth Century.

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Introduction

In recent decades, and as Del Pozo and Rabazas (2010) have pointed out, the use of so-called «new sources» in the History of Education field has ceased to be deemed an innovative element[1]. The consolidation of fields of study that for centuries were overlooked in the history sphere has obliged researchers to look beyond «classical» sources such as legislative texts and official documentation. The interest in new topics requires widening traditionally used resources. Far from the old focus on objectivity, current history may even evaluate seemingly more subjective testimonies which, although subject to rigorous analysis, are no longer perceived as a threat to scientific rigour but rather highlighted as a hugely valuable source of information that enables us to observe the past in a more complete sense.

As part of this historiographic trend, the analysis below presents a triangulation of historical sources in the aim of approaching schooling and everyday life from an *ilustre desconocida*[2] [illustrious unknown]: private religious schools, focusing here on schools for boys. Many authors have stated the many difficulties inherent to research into this type of educational institution, leading to its deserved moniker[3]. The reluctance shown by most religious congregations to allow external people to look through their past has, until today, made it difficult for historians working in the field. For a long time, this led to scant bibliography on religious schools, with most books being commemorative publications edited by people with close ties to the institutions. Nonetheless, different articles have recently been published that approach this topic in line with academic standards. The History of Education Studies Group (GEDHE) at the University of the Balearic Islands, where this research was designed, has taken an interest in reconstructing the past at these institutions and recently carried out some investigations into the area. Two studies stand out: the research into the San José Obrero School in Palma through the use of photographs[4] and the work on religious schools in the post-Spanish Civil War period (1939-1945) based on placement reports written by those taking teacher

[1] M.M. del Pozo Andrés, T. Rabazas Romero, *Imatges fotogràfiques i cultura escolar en el franquisme: una exploració de l'arxiu etnogràfic*, «Educació i Història. Revista d'Història de l'Educació», n. 15, 2010, pp. 165-194.

[2] A. Tiana Ferrer, *La escuela privada*, in J.L. Guereña, J. Ruiz Berrio, A. Tiana Ferrer (edd.), *Historia de la Educación en la España contemporánea. Diez años de investigación*, Madrid, Centro de Publicaciones del Ministerio de Educación y Ciencia, 1994, pp. 117-139.

[3] E. Bernad Royo, *La instrucción primaria a principios del siglo XX*, Zaragoza, IFC, 1984; P. Dávila Balsera, L.M. Naya Garmendia, *Las escuelas de los Hermanos de La Salle en Gipuzkoa. Evolución y tendencias en el alumnado y profesorado (1904-2006)*, «Ikastaria», n. 16, 2008, pp. 271-315.

[4] F. Comas Rubí, B. Sureda Garcia, *Album photographique scolaire, histoire et configuration de l'identité des établissements scolaires: le cas du collège Sant Josep Obrer de Palma*, «Encounters in Theory & History of Education», n. 17, 2016, pp. 119-140.

training courses at the *Escuela Normal* [Teacher Training School] in Palma[5]. The latter work served as inspiration for the research detailed in this article, taking the questions and hypotheses that arose from analysing the aforementioned placement reports as a starting point. With a view to providing a response to the «silences» and comparing the information in these reports[6], fifteen former pupils from religious schools for boys were located and interviewed; they coincided with the trainees placement time at the school and, in certain instances, in the same classrooms. The research therefore enabled us to gain an insight into the daily activity at private religious schools for boys through the eyes of two different stakeholder parties (the trainee teacher and the pupils), with information on the same reality expressed through two highly different documents: trainee reports and personal testimonies.

1. *Methodology and sources*

In order to undertake the research, a history method was applied that required the use of heuristics (locating and compiling sources), criticism (verifying the authenticity and value of the sources) and synthesis (final product). The analysis in this article is based on the recollections from fifteen oral testimonies from different towns in the Balearic Islands which, in accordance with the method used, shall be subject to appropriate historical critique.

Table 1. Categorisation of the interviewees according to town and school

TOWN	SCHOOL	CONGREGATION	TESTIMONIES
Artà	San Buenaventura	Franciscans	Gabriel Serra
			Jaume Casellas
			Guillem Massanet
Ciutadella	San Francisco de Sales	Salesians	Joan Bagur
			Alfredo Moll
Llucmajor	San Buenaventura	Franciscans	Bernat Garcias
Palma	San Agustín	Augustinians	Bartomeu Sansó
			Andreu Sansó
	Montesión	Jesuits	Rafael Perera

[5] G. Barceló Bauzà, S. Moll Bagur, B. Sureda Garcia, *La escuela privada religiosa en Mallorca durante la postguerra. Cultura y práctica escolar*, «History of Education & Children's Literature», vol. 2, n. 12, 2017, pp. 191-212.

[6] The «silences» refers here to all those issues with a huge interest for the field of study that the trainee teachers – whether consciously or not – failed to mention in their reports.

Pollença	Montesión	Theatines	Antoni Reynés
			Josep Lliteras
			Antoni Cifre
Sóller	Sagrado Corazón de Jesús	Missionaries of the Sacred Heart	Miquel Colom
			Francesc Arbona
			Salvador Reynés

The reasons behind the selection of the schools in the table above should firstly be mentioned. In order to compare the information in the teacher trainee reports, priority was given to locating former pupils who were enrolled at one of the schools from said reports. These schools were: San Buenaventura in Artà, Montesión in Pollença, Sagrado Corazón in Sóller, San Buenaventura in Llucmajor and Montesión in Palma. In turn, and with a view to enriching the analysis, the number of schools included was widened from the previous research. In this sense, testimonies from former pupils at a Salesian school in Ciutadella (San Francisco de Sales) and an Augustinian school in Palma (San Agustín) were included.

Following on from the selection criteria for the oral histories, it is important to highlight the factors to be taken into account when decoding and rigorously interpreting what the interviewees recount. When looking into their family background, we saw that it changed depending on the town under analysis. Most of the interviewees who lived in small towns at the time (Artà, Sóller, Pollença, etc.) came from families who worked the land. In contrast, most of the interviewees enrolled at schools in larger towns such as Palma or Ciutadella came from middle class families where the father and older brothers worked in small workshops, factories or, in certain instances in Palma, in public bodies such as the army or the provincial council. It should be underscored that those who grew up in families with a medium to high purchasing power were able to take their baccalaureate (five out of fifteen) and, even, a university degree (two of the five who took the baccalaureate). In turn, those interviewees from lower income households left education at the end of primary school in order to join the labour market and contribute to household income (eight of the fifteen), although some of them continued studying at the Business School (two of the fifteen).

The link between the interviewee, his family and the school in question – both in the past and at present – is also one of the key aspects to bear in mind. A large number of the interviewees (twelve out of the fifteen) state they actively collaborated during their school years in associations, publications and other activities linked to the school; meanwhile, a smaller number (six out of fifteen) state that they continued to take part in school activities after their studies, although this participation has reduced today due to their advanced years. The fact that at the end of their schooling many interviewees continued to maintain direct and emotional ties with their school shows a sense of belonging that may have influenced their recollections.

Further aspects that may condition the answers provided by the interviewees include those linked to what certain sociologists have termed the «social construction of memory». Despite the recollections of the interviewees being individual, according to Maurice Halbwachs we are unable to talk of strictly personal recollections as they are only maintained if they are shared and set by different mechanisms in society. The French author highlights that the past is not preserved but rather reconstructed based on the present, thanks to instruments, social conventions, words and socio-temporal categories that social groups provide to each of their members. Thus, we need to take into account that the events and experiences recounted by the interviewees – what could be deemed «individual memory» – come from the collective memory of the social group they belong to, as well as from the latter's interference with other collectives they have ties to[7]. And in a similar vein, Theodore Plantinga adds that mass media and the culture industry also play a fundamental role in the construction of collective memory by homogenising and operationalising the past in the aim of making the world around us coherent[8]. Consequently, when undertaking a study of this kind, one should bear in mind that there is no pure and rational memory but rather an image of the past shaped by nostalgia and conditioned by society and its institutions.

To end this section on methodological issues, it should be stated that in order to carry out the fieldwork, we selected one of the most currently used techniques in the field of qualitative research: semi-structured interviews. This technique enables information provided by oral accounts to be collected through a flexible script and the formulation of open questions, allowing for greater nuance to be compiled and different issues be, in turn, interwoven[9]. The interviews were also recorded on a Dictaphone since, in comparison to systematic note-taking, it enables greater control over the interview and a more reliable transcription[10].

2. *The historical and pedagogical context: post-Spanish Civil War schooling*

From the start of the Spanish Civil War, and where the military coup was victorious like in Majorca, the foundations of Republican education policy were ripped apart and replaced with a new educational order. The new system that

[7] M. Halbwachs, *La mémoire collective*, Paris, Presses Universitaires de France, 1968.

[8] T. Plantinga, *How Memory Shapes Narratives: A Philosophical Essay on Redeemingthe Past*, Michigan, The Edwin Mellen Press, 1992.

[9] L. Díaz Bravo, U. Torruco García, M. Martínez Hernández, M. Varela Ruiz, *La entrevista, recurso flexible y dinámico*, «Investigación en Educación Médica», vol. 2, n. 7, 2013, pp. 162-167.

[10] M.S. Vallés Martínez, *Entrevistas cualitativas. Cuadernos metodológicos*, Madrid, CIS, 2002.

started to emerge during the conflict, and whose fundamental features would remain almost intact until the 1960s, was based on two basic principles: the glorification of Spanish nationalism and religious fervour[11].

As is well known, conservative Catholicism was to be one of the main ideological supports of the new regime in all areas. The church was a staunch ally of Francoism, particularly in the education sphere. Religious symbols and practices that had been eliminated during the 2nd Republic returned to public schools. The entire set of religious practices and symbols was also strengthened and legitimated at religious schools: the crucifix and religious portraits, attendance at religious events and holidays linked to Catholic commemorations were common at these types of schools. The Franco regime also introduced a glorified patriotism and nationalism at schools which, combined with a religious bent, gave rise to so-called National Catholicism to designate the ideological orientation of the period. During the post-war period, schools became one of the most powerful tools to legitimise the new regime, honour its heroes and justify the dictatorship[12]. One of the questions that this study may help to uncover is the penetration level of official patriotic slogans in daily practice at private religious schools.

This new turn in school culture was imposed through several mechanisms. One of the main ways was the cleansing of teacher training throughout Spain. The process was implemented by *comisiones depuradoras* [purge commissions] at provincial and, later, national level, and sought to impose faithful adherence amongst teachers to the new principles of those who had revolted against the legitimate Republican government. The cleansing commissions in each region set out a charge sheet against teachers they suspected of having ideological beliefs on the left. When presented with the accusation, teachers had to produce a discharge sheet to demonstrate their innocence, based on different documentary evidence. Finally, the Provincial Commission would issue a verdict, which would be ratified or amended by the *Comisión depuradora central* [Central Purge Commission][13].

Although the political sphere cut all ties with educational work from the Republican period, as evidenced by new legislation, the cleansing processes, changes to syllabi and even the decoration and names of schools, it should be stated that the teaching practice of many teachers was able to include signs of resistance to the onslaught of pedagogical traditionalism dictated by the new

11 A. Escolano Benito, *Discurso ideológico, modernización técnica y pedagogía crítica durante el franquismo*, «Historia de la Educación. Revista interuniversitaria», n. 8, 1989, pp. 7-28.

12 A. Mayordomo Pérez, *Nacional-catolicismo, tecnocracia y educación en la España del franquismo (1939-1975)*, in A. Escolano, R. Fernandes (edd.), *Los caminos hacia la modernidad educativa en España y Portugal (1800-1975)*, Zamora, Fundación Rey Alonso Henriques, 1997, pp. 147-174.

13 F. Morente Velero, *La escuela y el Estado Nuevo. La depuración del Magisterio Nacional (1936-1943)*, Valladolid, ÁMBITO ediciones S.A., 1997.

leaders. In this sense, Gabriel Barceló points out that most teachers in the post-war period were heirs of a previous school culture and education that had introduced new ideas. This could explain why, despite the homogenous and stereotypical image of Francoist education, there were many continuities in educational practice in the early Franco years[14].

3. *Triangulating sources: two tales of everyday life at religious schools in the post-war period*

In order to be able to easily compare the information provided by the personal testimonies with the reality described in the trainee reports used in previous research[15], it was decided to present the study results via the same thematic classification used in said earlier research.

Buildings and spaces

All the interviewees highlight the quality and suitability of the school facilities where they studied. In line with the information contained in the trainee reports, the former pupils recall their schools as light, airy and clean spaces[16]. Along these lines, Rafael Perera from the Montesión School in Palma states that «it was a clean, pleasant space»[17], and Guillermo Massanet from the San Buenaventura School in Artà affirms that «the classrooms were cheerful»[18]. In turn, and in contrast to the idyllic discourse of the trainees, most interviewees mention that their schools did not have heating, which meant the temperature in some rooms in winter was the same as or below that in the street. Bernat Garcias from the San Buenaventura School in Llucmajor explains that «it was cold and better to keep your coat on»[19].

14 G. Barceló Bauzà, *La enseñanza primaria en Mallorca (1939-1949). Cultura y prácticas escolares*, Doctoral Thesis, Department of Pedagogy and Specific Didactics (Supervisors: F. Comas Rubí and B. Sureda Garcia), Palma, University of the Balearic Islands, Academic Year 2016-2017.

15 *Ibid*.

16 Light is central feature in both the trainee descriptions and the recollections of the former pupils. This is not incidental as for some congregations, the presence of light was of utmost importance, not only for lighting conditions themselves but also for its mystical significance: light and truth. See: S. Ramos Zamora, T. Rabazas Romero, C. Colmenar Orzaes, *Fotografía y representación de la escuela privada madrileña en el franquismo. Entre la propaganda y el relato*, «Historia y Memoria de la Educación», n. 8, 2018, pp. 397-448.

17 Oral interview with R. P., 29.03.2017.

18 Oral interview with G. M., 06.02.2017.

19 Oral interview with B. G., 03.04.2017.

In terms of spaces designed for breaktime, most interviewees agree with the trainee teachers, stating that the schools had a patio that was big enough for all enrolled pupils. Nevertheless, a small number of interviewees state that the patio was not suitable and, therefore, children would often crash into one another when playing their different games. To solve this issue, some schools chose to organise breaktime in shifts, as was the case at the Montesión School in Pollença, according to the testimony of Josep Lliteras[20]. It should be stated that the three interviewees from the San Buenaventura School in Artà contradict what the trainees had written in their reports, emphasising that breaktime did not take place at the school but rather in the surrounding streets.

With regard to annexes, and despite being constantly cited by the trainees as a quality feature of the school, many of the former pupils do not recall them. Those who do recall these spaces, such as libraries, laboratories or school museums, state that they were not used or only used on special occasions. Antoni Reynés states that «we never went and I don't know what it was for» with regard to the school museum at the Montesión School in Pollença[21]. Nonetheless, they do recall well other spaces that are not mentioned in the trainee reports[22], such as the brothers' rooms on the top floor of the building; the rooms exclusively used by youth associations or by former school pupils; the cafeteria where students and staff affiliated with the school would eat; the secretary's office where school material was on sale; the meeting room that also doubled as a cinema and theatre, etc. It is important to underscore the difficulty many of the interviewees had in discerning the spaces at their schools since most included convent or church spaces which were attached to the school. The former pupils recall the non-school and religious spaces as being part of the school spaces in a symbolic union that comprises a single space of learning and co-existence.

In turn, many of the interviewees describe the decoration of their schools as simple and austere, emphasising the religious portraits and, specifically, the pictures of saints that founded or belonged to the school's religious order. Alfredo Moll, a former pupil of the Salesian school in Ciutadella, highlights that the décor was very sober, only recalling the presence of portraits of standout Salesian leaders such as Saint John Bosco and Dominic Savio[23]. In turn, the interviewees from the San Buenaventura School in Artà underline that, alongside the odd map, the school's hallways housed portraits of Franciscan luminaries such as Ramón Llull, Saint Francis of Assisi and Saint Anthony of

20 Oral interview with J. LL., 22.03.2017.

21 Oral interview with A. R., 22.03.2017.

22 In contrast to the trainees, the former pupils go beyond exclusively «educational» spaces (classrooms, annexes, libraries, etc.) and expand on their descriptions by mentioning areas and places not related to classes but which were significant in their daily life as pupils.

23 Oral interview with A. M., 10.04.2017.

Padua[24]. Six of the fifteen former pupils remember the presence of the Spanish flag. Only the oral histories from the Salesian school in Ciutadella, the Theatine School in Pollença, the Jesuit School in Palma and the Franciscan School in Llucmajor recall it, and in the case of the Llucmajor school, it was not flown either in the patio or at the entrance – unlike the other aforementioned schools – but rather kept in the headmaster's office.

Few remember the presence of a portrait of General Franco (five of the fifteen) inside the classroom, which would contradict with the regulations from the time and what is stated in most of the trainee reports. Conversely, they clearly remember the crucifix and the religious portraits, as well as maps of Spain or Europe. With regard to the decoration at the Franciscan school in Artà, Jaume Casellas states firmly that there was no portrait of the dictator[25], underscoring «there was absolutely no political paraphernalia»[26]. According to Bernat Garcias, the same was true for the Llucmajor school run by the same order. The interviewee mentions that «in class there was a crucifix but no portrait of Franco», adding that «it was strange for the time»[27]. This information highlights some resistance amongst certain religious orders to incorporate patriotic/totalitarian symbology and discourse at their schools that the new regime's authorities attempted to impose in education[28].

Furniture and materials

Most of the interviewees recall there being the same type of furniture: desks with attached benches for two or three pupils; individual desks; the teacher's desk; wooden floors; coat racks; cupboards to store material, and shelves for textbooks and reading books. In the same way as they are described in the trainee reports, the former pupils highlight the quality and good repair of the furniture and material in the classrooms, although interviewees from the Salesian school in Ciutadella and the Franciscan school in Llucmajor underscore their poor

[24] Oral interview with G. S., 06.02.2017; Oral interview with J. C., 06.02.2017.

[25] Oral interview with J. C., 06.02.2017.

[26] Patriotic symbology is hardly mentioned by the interviewees, as well as in the descriptions from the trainee teachers. In contrast, reports from the same period about public schools highlight its presence alongside, on occasions, Falange ornamentation. See: G. Barceló Bauzà, F. Comas Rubí, B. Sureda García, *Abriendo la caja negra: la escuela pública española de postguerra*, «Revista de Educación», n. 371, 2016, pp. 61-82.

[27] Oral interview with B. G., 03.04.2017.

[28] The conflict between the patriotic/fascist sector and the Catholic Church – especially important in the field of education – has been analysed in works such as Cañabate (2003). See: J.A. Cañabate Vecina, *La pugna entre la Iglesia Católica y el Frente de Juventudes en el ámbito educativo. Referencias internacionales, antecedentes y trayectoria general durante el Primer Franquismo*, «Historia de la Educación: Revista interuniversitaria», n. 22-23, 2003, pp. 105-121.

state-of-repair. Joan Bagur highlights with regard to the furniture at the Salesian school that in the initial post-war years, the state of the desks and chairs was very ramshackle with broken, unstable desks making writing exercises difficult. The main causes of this ill-repair were, according to the interviewee, their age and the damage caused during the Spanish Civil War[29].

In terms of writing material, the same tools are mentioned as those that appear in the trainee documents, such as pencils, fountain pens, notebooks, ink, etc. The interviewees explain that they could be purchased at stationers or printers in town, although the secretary's office at some schools also sold them. Salvador Reynés from the Sagrado Corazón School in Sóller recalls there being «a small shop under the stairs» where one could buy all the material required for class[30]. Different interviewees mention these kiosks at their schools (seven of the fifteen), explaining that payment for the material was made at the end of the month alongside tuition and other services offered at the schools.

In turn, most of the interviewees categorically state that the didactic resources merely amounted to an encyclopaedia – at times passed down from elder siblings due to the high cost – and a blackboard. The few interviewees who mention the presence of laminates, sets of geometric shapes, measuring tools, minerals or other typical material for active and intuitive learning (six of the fifteen) underscore that they were not used or only used on occasions; this contradicts with what the teacher trainees state in their reports, where they highlight and appreciate the presence of these materials a lot. With regard to reading books, only a few interviewees recall them (four out of fifteen). According to the testimonies of the former pupils from the San Francisco de Sales School in Ciutadella, the biography of Saint John Bosco – founder of the Salesian order – was mandatory reading for all pupils at the school, alongside other religious texts.

School organisation

In order to present the information on organisational aspects at the schools clearly and orderly, this section will be split into different blocks: enrolment and attendance; timetables; syllabus issues and human resources.

a) Enrolment and attendance

According to nearly all the interviewees, school attendance was high and regular throughout the year. In line with the trainees and other former pupils,

[29] Oral interview with J. B., 22.12.2016.
[30] Oral interview with S. R., 14.03.2017.

Alfredo Moll states that «absences were rare and, if you were absent, you had to bring a note»[31]. Some interviewees give examples highlighting the importance that teachers placed on this issue. According to Jaume Casellas, a former pupil at the Franciscan school in Artà, when a child missed several days in a row, the teacher would ask the rest of the class if they knew why he was absent and, if they did not, would ask one of his classmates to go to the missing pupil's home to check on him[32]. Nevertheless, the interviewees from Artà, Sóller and Pollença mention that they themselves, or other classmates, would stop attending school for a specific part of the year so as to help their parents during the crop seeding and harvest periods, or to take part in harvesting the olives organised by different groves in the town[33].

With regard to tuition payments – one of the many «silences» in the trainee reports – most interviewees state that it was a mandatory monthly fee which would be handed over to the school secretary by the pupils themselves. Those able to recall the exact amount (eight of the fifteen) state that tuition for the first years ranged from five to fifteen pesetas, and progressively increased to reach between sixty and eighty pesetas for baccalaureate, depending on the school, the extra-curricular activities pupils did and the school services they used. There are also other instances, such as the San Francisco de Sales School – where neither interviewee recalls a monthly fee – which state that payment was voluntary. School income came from family donations (financial or food baskets) and activities organised by the school such as plays, cinema, religious ceremonies, etc. Joan Bagur also highlights raffles and flea markets being run every so often as a way to raise funds[34]. Along the same lines, and as an example of family involvement in helping the Salesian school financially, Alfredo Moll explains that when the brothers needed to renovate the large patio, they split it into square metre plots and most families bought one in order to ensure the work got done[35].

When it came to non-payment, many interviewees highlight that there were several classmates whose families could not pay the fees but who were never expelled from school. Rafael Perera states that at the Montesión School in Palma «they could expel you for bad behaviour but never for non-payment»[36].

31 Oral interview with A. M., 10.04.2017.

32 Oral interview with J. C., 06.02.2017.

33 Seasonal absenteeism is a standout aspect in both the trainee reports and the interviews from former pupils. It should be stated that as Barceló, Comas and Sureda (2016) highlight, this would also occur at public schools and, consequently, raises doubts concerning the homogeneous image of the socioeconomic profile of pupils enrolled at private schools. See: Barceló Bauzà, Comas Rubí, Sureda García, *Abriendo la caja negra: la escuela pública española de postguerra*, cit.

34 Oral interview with J. B., 22.12.2016.

35 Oral interview with A. M., 10.04.2017.

36 Oral interview with R. P., 29.03.2017.

In turn, some pupils received a discount on their tuition fees since they actively collaborated with the attached church, either in the choir or as altar boys[37].

Most of the oral histories from former pupils mention that the reasons why their parents enrolled them in a private religious school in the town were based on a belief that the quality of the education[38] and the religious nature were better than those at public schools. In turn, they state that pupils in public schools were seen in a negative light – a stigma that according to the interviewees still persists. Thus, in most recollections there are statements such as «they seemed to teach us better»[39], «you got the feeling that those at public school were below you»[40], «the better-off families always sent their kids to private school»[41],«those who could not go to Calós[42] were seen negatively in Ciutadella»[43], etc.

b) Timetables

Most of the interviewees explain, as reflected also in the trainee reports, that there were morning and afternoon classes from Monday to Saturday, except on Thursdays when they only went to school in the morning. At some schools, such as the Montesión School in Palma, Thursdays only had classes in the morning and at the other schools, in line with the new regime's instructions, the afternoon was spent on school trips or outings «alongside the beauty of Creation»[44]. Although there are slight variations in the start and finish times, most oral histories state that the school day comprised six hours of classes:

37 Oral interview with A. C., 22.03.2017.

38 One of the main foundations of «school marketing» at these schools was based on the quality of the education focused, amongst other factors, on covering the needs of the middle classes and leaders through a modern, technical curriculum. See: A. Viñao Frago, M.J. Martínez Ruiz-Funes, *Tradicion y modernidad: el programa iconográfico del Colegio de Nuestra Señora de la Bonanova de Barcelona (1900-1956*), «Revista di Historia dell'Educazione», vol. 5, n. 1, 2018, pp. 17-40.

39 Oral interview with M. C., 14.03.2017.

40 Oral interview with G. S., 06.02.2017.

41 Oral interview with J. LL., 22.03.2017.

Local elites and wealthy social groups chose private schooling since, as Zamora states (2014), it was a «breeding ground for social leaders» that makes these schools a social springboard for the middle classes, as well as a way to show belonging amongst socioeconomic elites. See: J.A. Zamora Sánchez, *El liderazgo de los antiguos alumnos formados en el colegio jesuita San Luis Gonzaga de El Puerto de Santa María (1864-1924)*, «Aula de Encuentro», vol. 1, n. 16, 2014, pp. 157-175.

42 *Calós* is the popular name for the San Francisco de Sales School in Ciutadella: an abbreviation of home of the fathers (*Casa de los Padres*).

43 Oral interview with A. M., 10.04.2017.

According to Marqués (2017), in the post-war period, not taking your children to the Salesian school in Ciutadella was synonymous with poverty and social rebellion and, consequently, in order to avoid any possible problems, most families chose the benchmark religious school. See: A. Marquès Benejam, *Els col·legis religiosos de Ciutadella de Menorca. La postguerra i els primers anys del franquisme. 1939-1967*, Master's dissertation (Supervisor: David Font), Palma, Universitat de les Illes Balears, Academic Year 2016-2017.

44 «Boletín Oficial del Estado» (BOE), 1938, p. 6155.

three in the morning and three in the afternoon. In turn, and despite their having no recollection of the time distribution for different subjects (in contrast to the trainee reports), they are all aware that much of the time was spent on independent learning, which at the Franciscan schools in Artà and Llucmajor and the Sagrado Corazón School in Sóller took place in a large common room alongside pupils from different years, from initial class groups to baccalaureate pupils. Some of the former pupils underscore that the individual learning time took place at the start and end of the school day, at times being voluntary[45] and coming at additional cost to the monthly tuition fee[46].

In terms of patriotic liturgies, many of the former students state that they never sang the national anthem at school (eleven out of fifteen), in contrast to public schools where the impression was that more events and celebrations of this kind were held. Despite not recalling the *Cara al Sol* [Facing the Sun] fascist anthem, Miquel Colom does remember having sung the school anthem on several occasions, the lyrics of which he still recalls (and demonstrated by singing it during the interview)[47]. In turn, all the interviewees coincide with the trainee reports by recalling the recital of prayers in the classroom and attending mass almost every day before the start of the school day. At times, this attendance was rewarded with a higher mark in religious studies class[48] or with discounted tickets to the school cinema[49]. The interviewees also clearly remember the annual celebration of the school congregation's patron saint. The church attached to the school and its youth organisations usually organised the celebrations, with the children and school community actively participating.

The youth and alumni associations of the schools are also clearly recalled in the descriptions from former pupils regarding daily life at school. These organisations designed a range of extra-curricular activities (sports and cultural and religious activities) for pupils at the schools[50]. Alfredo Moll underlines the importance and role of the Dominic Savio Association (active pupils) and the Alumni Association at the San Francisco de Sales School in Ciutadella. Both organisations had different rooms at the school itself which housed games such as pool, ping-pong and darts, as well as a space for sofas and chairs for meetings[51]. It should be highlighted that not only did these organisations

[45] Oral interview with J. B., 22.12.2016.
[46] Oral interview with S. R.,14.03.2017.
[47] Oral interview with M. C.,14.03.2017.
[48] Oral interview with B. G., 03.04.2017.
[49] Oral interview with A. C., 22.03.2017.
[50] As part of the Catholic Movement's strategy, most religious orders would organise «undemanding» activities that took up most of students' free time in order to recruit militants for their cause and, in this way, recover the power they had lost due to political liberalism and workers' movements. See: P. Fullana Puigserver, F. Montero García, *Los modelos educativos juveniles del movimiento católico en España (1868-1968)*, «Historia de la educación: Revista interuniversitaria», n. 22-23, 2004, pp. 33-51.
[51] Oral interview with A. M., 10.04.2017.

run activities in the rooms but they also organised and managed football and basketball teams[52], singing groups, plays and hiking groups.

c) Syllabus issues

In clear opposition to what is set out in the trainee reports, where the trainees recount how the feats of the rebels against the Republic were present in the day-to-day workings of the classroom[53], most oral histories (twelve out of fifteen) firmly state that they never heard anything about the Spanish Civil War or General Franco at school. Jaume Casellas affirms that «politics wasn't mentioned»[54] at the Franciscan school in Artà, whilst Bernat Garcias also states that at the San Buenaventura School in Llucmajor, «I never heard any propaganda from either side» with a neutral discourse being maintained and that merely «religious guidance was present, just guidance»[55]. Indeed, only two of the fifteen testimonies mention patriotic indoctrination. Rafael Perera states that at the Jesuit school in Palma, «the teachers spoke to us about the national uprising where they defended the values of Spain, Christianity and stopped the spread of Marxism»[56]. Along the same lines, Joan Bagur clearly recalls that on a school outing certain battles from the Spanish Civil War were re-enacted, such as the Siege of the Alcázar battle in Toledo, where he once played the role of General Moscardó[57].

In contrast to the scant recollections on patriotic teachings, many former pupils highlight that their teachers repeatedly spoke about religious topics and, more specifically, the most important figures from the religious order that ran the school. Alfredo Moll states that despite not remembering «habeany political talk» at the Salesian school in Ciutadella, he does remember several mentions about Saint John Bosco[58], underscoring that for the teachers there, «he was the leader», an example to follow[59]. As an example of the fervour surrounding Salesian leaders, the other former pupil from this school underlines that in their

[52] According to Bourdieu (1993), playing different sports at schools became an element of social distinction that made them stand out from public schols, as well as allowing them to control and model student morality. See: P. Bourdieu, *Sport and Social Class*, «Information (International Social Science Council)», vol. 17, n. 6, 1978, pp. 819-840.

[53] In his trainee report, José Roig explains that on a visit to the Port of Sóller «a new discussion about the sacrifice and dangerous undertakings of Sanjurjo, Goded, Franco and Our Crusade came up». See: AHUIB (FENMA), record 189, J. Roig, Colegio de San Buenaventura de Llucmajor, 1940, p. 6.

[54] Oral interview with J. C., 06.02.2017.

[55] Oral interview with B. G., 03.04.2017.

[56] Oral interview with R. P., 29.03.2017.

[57] Oral interview with J. B., 22.12.2016.

[58] The former pupils reveal that Catholic schools made great effort to foment fervour for the leaders of their congregations, becoming one of the many ways in which a collective identity and sense of belonging to the schools was intentionally sowed.

[59] Oral interview with A. M., 10.04.2017.

Drawing class, they would produce different portraits of both Saint John Bosco and Saint Dominic Savio[60].

In terms of language, many of the interviewees express a flexibility in this area (fourteen of the fifteen). Catalan was normally used amongst friends and, at times, even teachers without the children being reprimanded for it[61]. Along these lines, Antoni Cifre mentions that «we always spoke in *Mallorquín*[62], although we wrote everything and were taught in Spanish»[63]. As with the values of National Catholicism, only the testimony from the Montesión School in Palma paints a completely different picture to that of the other interviewees, since the Jesuit school did not allow Catalan to be used at all. Rafael Perera recalles that «nobody dared speak in *Mallorquín*». He also adds that due to this, when he speaks to a former classmate today and despite both having Catalan as a working language, «we always speak in Spanish»[64].

d) Human resources

The figure of the teacher, as well as his training or background, is another of the «silences» in the trainee reports. All the interviewees stress there being three teacher categories: lay brothers – whom they called «brother» – that worked on the early courses and domestic and administrative tasks at the school; ordained presbyter brothers – whom they called «father» – that taught on the higher courses and managed the school; and finally, the secular teachers with a degree who taught sections of the baccalaureate. With regard to the secular teachers at the Sagrado Corazón School in Sóller, Salvador Reynés highlights that the town doctor taught chemistry and the others were graduates from nearby towns[65].

Some oral histories also underscore that there were periodic changes in teaching staff due to instructions from the provincial chapter. According to Guillermo Massanet's testimony, these processes were run around every four years and, depending on the requirements at the time, each congregation would reorganise the duties and destinations of its members[66]. In this vein, several former pupils recall that some brothers left for other areas of the country or overseas to open new schools or new charitable centres. These new missions where brothers were sent served as a pretext during the school day to extol the values and pathway of the order[67].

60 Oral interview with J. B., 22.12.2016.

61 The treatment of Catalan is one of the «silences» in the reports, although flexibility surrounding this issue can be intuited in the report by the trainee S. Montelongo who states that «at times, when speaking to them in Spanish, they reply in Mallorquín». See: AHUIB (FENMA), record 189, S. Montelongo, Colegio de los Teatinos de Palma, 1940, p. 4.

62 *Mallorquín* is the popular way to refer to the Catalan dialect spoken on the island of Majorca.

63 Oral interview with A. C., 22.03.2017.

64 Oral interview with R. P., 29.03.2017.

65 Oral interview with S. R., 14.03.2017.

66 Oral interview with G. M., 06.02.2017.

67 Oral interview with A. M., 10.04.2017.

In turn, some interviewees recall that the school incited them to «devote their life to God»[68]. Miquel Colom states that at his school «they wanted pupils to become brothers and around seven went into the order»[69]. The same thing occurred at the San Agustín School in Palma[70], where several visits were made to the seminary to explain how it worked and to promote it[71].

Methodology

Just as many of the trainees described in their reports, the interviewees unanimously state that the teaching methodology in the era was based on memorisation and rote learning of different content. With regard to the Theatine school in Pollença, Antoni Reynés recounts that «the lessons didn't need to be explained but learnt by heart: you had to record the information up here (pointing to his head)»[72]. In this way, many interviewees state that they are still able to remember lesson content and recite the definitions of concepts that appeared in school encyclopaedias.

All the interviewees state there were no active or intuitive learning elements, which contrasts with the information in some of the trainee reports from the time[73]. Rafael Perera explains that in terms of using the laboratory or undertaking experiments or active learning activities, «this wasn't part of normal methodology, it was an occasional approach»[74]. In turn, competitions or quizzes were very common methodological strategies recalled by the interviewees (nine of the fifteen) and were used to see whether they had learnt the lesson from the previous day[75]. At the Sagrado Corazón School in Sóller and the Montesión

68 Oral interview with F. A., 14.03.2017.

69 Oral interview with M. C., 14.03.2017.

70 Oral interview with A. S., 22.02.2017.

71 Encouraging religious vocations was a common phenomenon at religious schools. Recruiting new «workers» was vital for the survival and development of congregations, running to 6% of former pupils at some schools. See: Zamora Sánchez, *El liderazgo de los antiguos alumnos formados en el colegio jesuita San Luis Gonzaga de El Puerto de Santa María (1864-1924)*, cit.

72 Oral interview with A. R., 22.03.2017.

73 The constant allusions to innovation and the use of Pestalozzi or Herbart's pedagogy methods do not show what teaching practice was like at these schools but rather comprise (as in the case of masking corrective corporal punishment) a strategy of trainees to comply with the theoretical requirements of an academic project such as teaching training reports. See: Barceló Bauzà, Moll Bagur, Sureda Garcia, *La escuela privada religiosa en Mallorca durante la postguerra. Cultura y práctica escolar*, cit.

74 Oral interview with R. P., 29.03.2017.

75 The use of competitive and emulation methodologies is another characteristic feature at these schools which encouraged, through school competitions and quizzes, the absorption of lessons in a fun, playful way. See: Ramos Zamora, Rabazas Romero, Colmenar Orzaes, *Fotografía y representación de la escuela privada madrileña en el franquismo. Entre la propaganda y el relato*, cit.

School in Palma, competitions were organised between two permanent teams: Rome and Carthage. Miquel Colom recalls that this methodology «helped to learn a lot since it sparked enthusiasm amongst most of the pupils»[76]. Rafael Perera points out that the competitions only took place «in lower years» and that each team had its own hierarchy[77]. Other oral histories mention that as well as competitions and quizzes, the teachers would use other memory techniques, such as singing aloud certain content from the school encyclopaedia[78].

Most interviewees recall school outings and excursions, although the frequency changes depending on the school they attended. On the one hand, some interviewees (six out of fifteen) express they went on trips «when it suited the brothers, not every week»[79], whilst others (seven of the fifteen) highlight that every Thursday afternoon «we would go on a walk»[80] in the country or on a beach in the area. Alfredo Moll states that a distinction should be made between school trips and walks as they had different lengths (trips were longer) and frequencies (walks every Thursday and trips every two to three months)[81]. Contradicting what was described in the trainee reports, most interviewees state that these outings were only walks and playing outside, refuting that teachers took advantage of the time to explain content from previous classes.

Discipline

When it comes to general behaviour amongst pupils, all the former pupils underscore that it was very good, although several of them state that there was always a classmate who repeatedly behaved badly and who, therefore, «stood out from the rest»[82]. It should be stated that just after recounting that pupil behaviour was generally good, they would always mention the severity of punishments where teachers' instructions were not obeyed, underlining the reason behind the «good behaviour» of the pupils at these schools. In this sense, several interviewees state that good behaviour «we were ruled by fear»[83]. Although the teacher trainees repeat on several occasions that «punishment was banished at this school»[84], most interviewees recall different times where they or other classmates suffered corrective punishment[85]. Gabriel Serra explains

[76] Oral interview with M. C., 14.03.2017.
[77] Oral interview with R. P., 29.03.2017.
[78] Oral interview with A. R., 22.03.2017.
[79] Oral interview with J. LL., 22.03.2017.
[80] Oral interview with J. B., 22.12.2016.
[81] Oral interview with A. M., 10.04.2017.
[82] Oral interview with G. M., 06.02.2017.
[83] Oral interview with B. G., 03.04.2017.
[84] AHUIB (FENMA), record 189, S. Pedreño, Colegio La Salle de Palma, 1940.
[85] The reasons behind these differences may lie in the contradiction between scientific

that the most violent punishment in early years was pinching and slaps to the back of the head. The interviewee also states that some brothers used a hard stick or ruler to hit children[86]. According to Andreu Sansó from the San Agustín School in Palma, corporal punishment was used cruelly, highlighting hair-pulling and the use of a *vergueta* [rod][87]. Some oral histories explain that parents would defend the use of this type of punishment. Along these lines, Guillermo Massanet and Miquel Colom state that if their parents learnt that they had been hit, instead of feeling sorry for them, they would punish them again[88]. Finally, other punishments remembered more vaguely include additional tasks, public mockery or having to stand or kneel in one spot[89].

In opposition to what trainees from the *Escuela Normal* state in their reports, nearly all interviewees stress that there was little contact between the school and their parents, with parent-teacher meetings being exceptional events. Along these lines, the different recollections from interviewees include statements such as, «my parents only spoke to my teacher once a year»[90], «parents did not come into it at all»[91] or «parents and teachers had hardly any relationship»[92]. Most agree that contact meant casual meetings at church, the theatre or in other places not linked to the school. Finally, it should be emphasised that all remember the monthly report or update that parents had to sign. This document set out the child's marks for each subject, attendance and behaviour.

Conclusions

Methodological reflections

The use of a new historical source enables better understanding of events and facts, although the information from each source may not match. Here, the oral histories have provided a series of elements and fulfilled certain functions worthy of listing and explaining:

- Oral testimony as a «key»: faced with the lack of cooperation from most schools in providing valid sources for analysis, the testimony of former pupils

approaches and the values and norms at the time. In order to pass their placement subject, teacher trainees would write reports as much in line as they could with pedagogical theories taught at the *Escuela Normal*, which disapproved of the use of corporal punishment despite its general social acceptance at the time.

86 Oral interview with G. S., 06.02.2017.
87 Oral interview with A. S., 22.02.2017.
88 Oral interview with G. M., 06.02.2017; Oral interview with M. C., 14.03.2017.
89 Oral interview with B. S., 22.02.2017.
90 Oral interview with G. M., 06.02.2017.
91 Oral interview with J. LL., 22.03.2017.
92 Oral interview with A. S., 22.02.2017.

allowed us to look into the past at these schools and explore their daily activity which, at times, the schools seemed to want to hide from us.

- Oral testimony as a «supplement»: the interviewees have provided a set of information which, contrasted with other sources provided by the interviewees themselves and current scientific literature, has enabled us to fill in the «silences» that either voluntarily or involuntarily populate other sources (composition of teaching staff, funding, non-formal education, etc.). In turn, and although not mentioned in the results of this work, contentious and uncomfortable events at the schools, such as repeated physical or even sexual abuse – always retold «off the record» – contained in the oral histories could also be looked at in future research.

- Oral testimony as a «filter»: other elements that cannot be deemed as «silences» – since they appear or are mentioned in other sources – but require comparison with oral sources due to the questions they pose (truthfulness, disinformation, lack of specificity, etc.) have also been analysed. Examples of these include corporal punishment, overstated parental collaboration and the extent of patriotic decoration and liturgies.

- Oral testimony as a «source of sources»: the fact that each interviewee backs up his recollections with other historical sources such as photographs, school magazines, newsletters, etc. enabled a broad historical reconstruction rich in nuance, contrasting and widening information provided by the interviewees, as well as sketching new lines of research linked to the area of analysis.

With regard to the teacher trainee reports, triangulating sources enables us to see that the trainees (in order to pass their placements) produced these documents based on expectations, scientific culture and regulations from the period rather than on the reality and educational practice observed. As the oral histories have demonstrated, methodological innovation was not a constant at religious schools, in contrast to what the trainees attempted to represent. Corporal punishment (despite it being hidden) was the basis of school discipline and religious indoctrination at religious schools; it meant that the patriotic indoctrination demanded by the new national government played a secondary and anecdotal role. Nevertheless, these documents continue to be excellent records to look into the pedagogical practices and ideas that were deemed acceptable and «ideal» at a certain period of history, as well as ways to observe the articulation of academic discourse and educational ideals alongside what really went on inside the classroom.

Considerations on the content

After undertaking the fieldwork and analysing the information from the oral histories in-depth, we could state that private schools in the post-war period had their own school culture and identity. These characteristic features were

conditioned by several factors. Being located in a small rural town or provincial capital, and run by a religious or other order, are just some of the many variables inherent to school practice and daily life at these schools (methodology used, available resources, overarching values, etc.). Nonetheless, and despite the differences, a set of common attributes can be seen at all the schools.

One of the shared specificities at religious schools is the huge social influence they enjoyed during the post-war and later years. These schools built up a network of institutions, associations and other community structures far beyond the school gate, offering a wide selection of leisure, cultural and religious pursuits where pupils and parents would participate. This is why most interviewees state that their schools were «more than just a school»: they were sports clubs; youth associations; theatres; cinemas; music conservatoires; places of worship, etc. where children – tutored by the Catholic Church – would spend most of their time on both working days and holidays.

In turn, the collective identity and sense of belonging – constructed intentionally through alumni associations, school magazines, and songs and symbols innate to the schools – were further essential features shared by private institutions. This series of elements helped form the idea of an «us» (pupils and alumni of the school in question) and «them», which was key to making these schools authentic generators of social capital, comprising networks of support and influence amongst members.

Finally, the recollections of the interviewees also reveal that private religious schooling in the post-war period enjoyed a certain level of autonomy and independence in comparison to public schooling. Most of the former pupils insist that the values of National Catholicism promoted by the new regime had scant presence in the everyday activities at their schools. They recall often being told about the life and work of the founders and most venerated members of the religious congregations, serving as moral and value referents. In turn, little or nothing was explained about the leaders and martyrs of the military uprising that had triumphed and whose glorification was common at state schools and in public activities. In general, the interviewees do not recall patriotic liturgies, songs or ceremonies, or portraits of the head of state – *Generalissimo* Francisco Franco – playing a role in school life. In turn, common elements include religious ornamentation, singing the school song and events organised by youth and alumni associations at the school. We could therefore state that religious schools in the early post-war years were not completely subject to official instructions and guidelines from the new regime. They maintained a wide margin of independence with regard to the values they taught, although the presence of symbols and ideology of the new government – in line with the interviewees' accounts – could vary depending on the congregation or religious order that governed the school.

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Historical perspective of material school culture: theoretical and methodological possibilities*

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ABSTRACT: This paper focuses on understanding schools from a perspective that encompasses the thematic spectrum of material culture. The empirical basis of the study relies on commonly cited texts and authors who are considered authorities and interlocutors of the production about material school culture, especially those with greater circulation among the community of historians. We want to show that the studies dedicated to material school culture cover a range of countries and institutions. We believe that the study of the materiality of schools can be a powerful tool to demonstrate historical options about supplying different groups of children in the schooling process in different ways. But it may also indicate choices and incorporation of school objects, methods and practices, the universalisation of education and the reduction of social inequalities, and the provision of access to cultural and scientific assets through material supports to which children would not have had access were it not for schools.

EET/TEE KEYWORDS: Material school culture; Supply of school material; Theoretical-methodological perspectives in material school culture.

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> In my opinion, the study of the past is inseparable from its material culture
>
> Peter Burke[1]

Introduction

We understand that the study of the history of schooling is inseparable from its material culture. As such, for over a decade[2] we have been researching children's schooling by analyzing the materiality that shaped. Like Heloisa Pimenta Rocha, we adopt a perspective that questions «the educational past by examining artefacts and methods of production invented by different subjects and groups, to respond to the demands of schooling»[3]. We thus believe that giving visibility to the materiality that educates is part of the task of constructing lenses for reading this «social phenomenon», which is so important to the organization of societies.

We are inspired by the idea that in a fast-moving society (to recall Bauman's criticism of the influence of the advent of «fluid modernity» on the human condition)[4], which often does not ponder what it consumes and how it does so,

Scientific Meetings – 1st SIPSE National Congress (Universitat de les Illes Balears, Spain, 20th to 23rd November 2018), integrating Taller: Historical investigation of Scholar Practices, Reflections on its Sources.

1 In M.L. Garcia Pallares-Burke, *As muitas faces da história: Nove entrevistas*, São Paulo, Editora UNESP, 2000, p. 216.

2 We highlight here our participation in the Research Project entitled *For a theory and a history of primary schools in Brazil: comparative investigations of grade schools (1870-1950)* (including sources in the Universal Edict MCT / CNPq no. 15 / 2007), coordinated by Rosa Fátima de Souza who brought together researchers from different regions of the country to carry out the task, focusing on different topics. (To have a general idea of the project we recommend reading the book R.F. de Souza Chabola, V.L. Gaspar da Silva, E. Figuereido de Sá (edd.), *Por uma Teoria e uma História da Escola Primária no Brasil: Investigações comparadas sobre a escola graduada* (1870-1930), Cuiabá, EduFMT, 2013. The Thematic Group G2 School Material Culture: comparative investigations of grade schools (1870-1950) conducted studies and activities related to school material culture. The Thematic Group G2 included: Diana Gonçalves Vidal, Vera Gaspar, Gizele de Souza, Eliane Peres and Cesar Augusto Castro. Some of the Group's work is located in the book: C.A. Castro (ed.), *Cultura Material Escolar: a escola e seus artefatos (MA, SP, PR, SC e RS, 1870-1925)*, São Luís – Maranhão, EDFMA-Café & Lápis; 1st edition in 2011 and 2nd edition in 2013.

3 H.H. Pimenta Rocha, Indispensáveis em todas as escolas: uma incursão no mundo dos objetos escolares, «Educar em Revista», v. 35, n. 76, July/August 2019, pp. 95-118, cit. on p. 102 <https://revistas.ufpr.br/educar/article/view/67775/39572> (last access: 04.11.2019).

4 According to Bauman «time acquires history given that the speed of movement through space (unlike the eminently inflexible space, which cannot be stretched and which does not shrink) becomes a matter of human ingenuity, imagination and resourcefulness The very idea of speed (even more conspicuously, that of acceleration), when referring to the relationship between time and space, assumes its variability, and it would be unlikely to have any meaning at all if the relationship was not truly variable, if it were an attribute of inhuman and pre-human reality rather

whether by individuals or institutions, it is necessary to deepen the reflection on the material items that edify the schooling of childhood. This contributed to thinking about this childhood as a structural category of society[5], with a distinct social status that is the fruit of the historical construction of a set of rules and prohibitions[6], and to reflecting on the interfaces through which the materiality imposes, shapes and produces social and educational meanings.

Here we cite the reflection coined by Agustín Escolano Benito with the aid of Walter Benjamin:

> In these texts and objects the past has left images comparable to those that light leaves on a photographic plate, Walter Benjamin noted upon recalling a writing of André Mongland of 1930, and only the future – not its present – possess the chemically active «reagents» for revealing the content and forms of those old clichés[7].

The tools with which we work or highlight function as «revelators» or active agents that help unveil intentions, interests and desires that constitute schools through their artefacts.

Having outlined the coordinates that guide us, our main task in this text is to give visibility to this way of looking at schools, presenting a thematic scope about the material culture, which provides some investigative avenues for the history of education.

The empirical basis of the study relies initially on commonly cited texts and authors considered to be authorities and interlocutors about the topic of material school culture, especially those with greater circulation among the community of education historians in Brazil, Spain and Italy. We mapped these authors based on the theoretical framework and the production with which we have worked[8].

than a matter of human inventiveness and resolve, and if it did not extend far beyond the narrow range of variations to which the natural tools of mobility – human or equine legs – had normally confined the movements of pre-modem bodies». Z. Bauman, *Modernidade Liquída*, transl. by Plínio Dentzien, RJ, Zahar, 2000, p. 16.

5 J. Qvortrup, *A infância enquanto categoria estrutural*, «Educação e Pesquisa», vol. 36, n. 2, 2010, pp. 631-644. Available at: <https://doi.org/10.1590/S1517-97022010000200014> (last access: 04.11.2019).

6 M. Jacinto Sarmento, *Gerações e alteridade: interrogações a partir da sociologia da infância*, «Educação e Sociedade», vol. 26, n. 91, May/August 2005, pp. 361-378.

7 A. Escolano Benito, *Etnohistória e Cultura Material da Escola: A Educação nas Exposições Universais*, in V.L. Gaspar da Silva, G. de Souza, C.A. Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, (1st ed.), Vitória / Espírito Santo, EDUFES / Coleção Horizontes da Pesquisa em História da Educação no Brasil, 2018, pp. 93-118, in partic. p. 108.

8 Some of the authors identified were invited to present reflections located in Gaspar da Silva, de Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: escritas e possibilidades*, cit., which in Brazil received the seal of the Brazilian Society of the History of Education, and is part of the Coleção Horizontes da Pesquisa em História da Educação no Brasil [Horizons Collection of Research in the History of Education in Brazil], and which was published by the publisher of the University of Espírito Santo in 2018. An Italian version is being published by the publisher of the

More than presenting a list, we want to show that the studies[9] dedicated to material school culture are found in different countries and institutions, which indicates their relevance and importance. In general, these studies investigate different aspects of schools and their material supplies, supported by a vast set of archives and sources.

This study focused on three fronts. Firstly, to track the theoretical-methodological elements regarding the material culture, we reflected on production in the field (or part of it) but not with the primary concern to attribute a «declaration» to a particular author. We saw this as a kind of precaution needed to avoid the risk of distortions caused by the lenses we use, and especially because our intention is to explore perspectives of the methodological operation and analyses that deepen reflections drawn from material school culture and not to carry out an appraisal of the production. Secondly, we broke down the data into summary tables that highlighted these perspectives. This operation played an instrumental role in organizing the information at the service of our formulations. This led to the last movement, which involved identifying possible investigative routes for the topic of material school culture. We now present what we believe to be a potential investigative agenda that has guided some research efforts and which can stimulate other lines of study.

University of Macerata, with the support of the Centre for the Documentation and Research on History of Textbooks and Children's Literature (CESCO), Macerata (Italy), in conjunction with professors Roberto Sani and Juri Meda.

[9] Although, as we mentioned, our intention is not to present a list, we shall identify some authors responsible for the writing of the 16 articles in the book *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, that we organized in partnership with Cesar Castro and mentioned above, which reflects on material school culture and material culture from a range of perspectives. They are: Cynthia Greive Veiga (UFMG – MG / Brazil); Dominique Poulot (University of Paris 1 Panthéon-Sorbonne); Agustín Escolano (retired professor of the University of Valladolid and director, since 2006, of the Centro Internacional de la Cultura Escolar – Ceince – in Berlanga de Douro, Spain); Vera Lucia Gaspar da Silva and Gizele de Souza (University of Estado de Santa Catarina – UDESC and Federal University of Paraná – UFPR respectively); Heloisa Maria Silveira Barbuy (University of São Paulo); Cristina Yanes Cabrera and Guadalupe Trigueros Gordillo (both of the University of Sevilla), Marta Brunelli (University of Macerata – Macerata / Italy); Heloisa Helena Pimenta Rocha (University Estadual de Campinas – UNICAMP); Wiara Alcântara and Diana Vidal (Federal University of São Paulo – UNIFESP / Diadema and University of São Paulo – USP, respectively); Cesar Augusto Castro and Samuel Luis Velázquez Castellanos (Federal University of Maranhão); Heloisa Helena Meirelles dos Santos and Ana Chrystina Venancio Mignot (both of the University of Estado do Rio de Janeiro – UERJ); Inés Dussel (Departement of Investigaciones Educativas – CINVESTAV / Mexico); Martin Lawn (University of Oxford / England); Rosa Fátima de Souza and Rosilene Batista de Oliveira (University Estadual Paulista – UNESP and Centro Universitário Moura Lacerda – Ribeirão Preto / São Paulo, respectively); Eurize Caldas Pessanha and Fabiany de Cássia Tavares Silva (Federal University of Mato Grosso do Sul – UFMS), Rodrigo Rosselini Julio Rodrigues and Silvia Alicia Martínez, (University Estadual do Norte Fluminense Darcy Ribeiro – UENF).

1. *Investigative avenues in the writings on Material School Culture*

In reading the texts consulted to prepare the reflections presented here, the perspective we developed highlighted modes of reading schools based on their materiality. As warned above, our indications do not necessarily respect what the authors we read propose or recommend, and comprise a particular reading, an effort to systematize forms of operating constructions of analyses of schools based on their materiality. To do so, we organized our work by assertions, which have – according to Chartier's definition (2010) – a transitive and reflective dimension[10], which can be expressed here as «operative modes» of a methodological and analytical path that uses material school culture as its axis or guide.

«The compulsory schooling of children creates new forms of inclusion and exclusion». The determination that schooling would be compulsory was an unprecedented educational phenomenon which, as has long been affirmed in the literature in the field, had strong and broad impact in various countries in the late nineteenth and early twentieth centuries[11]. Reflecting on the topic, Anne-Marie Chartier emphasized that,

> Throughout the world, many children do not head off to school every day, because other urgent matters take precedence: many work, live in regions where the school network cannot or does not want to include them, some are left to their own luck, others belong to minorities left to fend for themselves or live in countries at war[12].

This is a reflection that says a lot about school; its compulsory nature – which is a «phenomenon» that has become almost naturalised, but that is implemented in an interplay of tensions that cannot be ignored – operates with inclusion but also constructs a category of the non-included. In countries like Brazil, which which since schooling became mandatory implemented different ways of organizing schools (both in terms of teaching staffs and the provision of materials), most often depending on the public served, the supposed inclusion was at the root of an exclusionary process. Cynthia Greive draws attention to the fact that

> […] school for everybody, a supposedly inclusive measure, insofar as not every child attend, either because they were working or because the state did not provide schools, introduced

[10] R. Chartier, *Escutar os mortos com os olhos*, «Estudos avançados», n. 24, 2010, pp. 7-30. This refers to the dialogue about representation, that Roger Chartier establishes with Louis Marin.

[11] Here we highlight the book entitled A. Novoa, J. Schriewer (edd.), *A difusão mundial da escola: Alunos, Professores, Currículo, Pedagogia*, Lisbon, Educa, 2000.

[12] A.M. Chartier, *Paradoxos da obrigatoriedade escolar*, in D. Gonçalves Vidal, E. Figueiredo de Sá, V.L. Gaspar da Silva (edd.), *Obrigatoriedade Escolar no Brasil*, Cuiabá, EDUFMT, 2013, pp. 421-438.

from the 19th century, in an unprecedented manner, a new mode of social exclusion – educational exclusion[13].

In this context, the study of school materiality can be a powerful tool to show options taken through history concerning differential provisions to different groups of children in schools. The study may also indicate choices and incorporation of objects, methods and school practices involved in working with children, the universalization of education and the reduction of social inequalities, providing access to cultural and scientific assets through material supplies that children would not have access to if not for school.

Another line of construction of analyses that stands out in our research is the «comparison between the materiality and the monetary value that it represents at a given epoch». Like analyses about social organization and ways of life constructed from this perspective, this type of analysis could give visibility to financial investments (highlighting the sources: public and private) made to institutions that supported social organization since the end of the 19th century. While by the end of the 20th century the large majority of countries followed internationally agreed recommendations about the percentage of budgets that should be invested in education, this was a gradual construction that was in step with the organization of states, with different mechanisms of fees, taxes and revenue collection. This is an analytical perspective that requires a very complex theoretical-methodological composition, since it implies the analysis of economic indicators from various countries, and applying formulas for correcting monetary values. However, an economics-based study supported by sociological aspects can bring to light very significant findings about the economic value of schooling throughout history[14].

As we have mentioned and in line with studies in the field, we understand that the project to educate the masses required strong articulation with commercial sectors, which took part in the task of producing materials that would support constructing the schooling project for children (in the late 19th and early 20th century). However, this enterprise in educational commerce also involved artisanal forms of supplying school material that involved direct relations with subjects from the community, such as those in which a teacher would order certain goods from a local craftsman, and later negotiate the reimbursement with the state. Many of these initiatives sought to provide schools with indispensable

13 C. Greive-Veiga, *A história da escola como fenômeno econômico: diálogos com história da cultura material, sociologia econômica e história social*, in Gaspar da Silva, Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, cit., pp. 29-66, in partic. p. 41.

14 As an example, we highlight the thesis of W.R. Rios Alcântara, *Por uma história econômica da escola: a carteira escolar como vetor de relações (São Paulo, 1874-1914)*, Doctoral Thesis, Graduate Program, Education of the University of São Paulo, (Supervisor: Diana Gonçalves Vidal), Brazil, Academic Year 2014.

items such as desks[15], but we can also think about the handmade notebooks, often produced by mothers who took advantage of any paper available at a time when access to notebooks produced on an industrial scale was limited, either because of the supply or the price. These premises support the thesis about the existence of «arranged business»[16], manifest by different ways of contracting, negotiating and supplying materials for primary schools.

«Imaginary pleasure based on the consumption of something new». The various designs and formats of school artefacts presented at the Universal Expositions [World's Fairs], which were seen as spaces that welcomed and displayed

> […] the inventions that gave rise to the first modes of school production, developed in parallel to the origins of the national education systems. These include, among others, the first textbook publishers, the inventors of machines of incipient educational technology, representatives of state bureaucracies interested in showing their successes and advances in relation to others and the associations that drove the actions that fed popular culture[17].

The great Universal Exhibits [World's Fairs] stimulated the desire to consume the latest novelties and the pleasure of those who acquired these items and made them available to the public through institutions: they highlighted the presence or absence of objects as modes of educating. As Dominique Poulot warns, «consumption may appear to be a positive contribution to the creation of a culture and for the development of its meanings»[18].

An investigative path related to the Universal Exhibits could focus on sketching the relationships between these grand international events and national and local actions, to understand, for example, in relation to school furniture, how merchants and cabinetmakers took part in the fairs and exhibits and the impact of this on disputes over and public bids for the supply of school furniture[19]. More than just showcases of modernity, the Universal Exhibits were stages

[15] Regarding simplified forms of supplying material, see the work of Gecia Aline Garcia entitled *Cultura material escolar: um estudo sobre o percurso profissional de marceneiros paranaense e sua relação com o provimento material escolar (anos finais do sec. XIX e nos iniciais do sec. XX)*, presented at the *10th Brazilian Congress of the History of Education*, in September 2019, in Belém do Pará. This study is related to the author's master's dissertation.

[16] We focus heavily on this topic in the article: G. de Souza, V.L. Gaspar da Silva, *Negócios Combinados: modos de prover a escola pública primária (em fins do século XIX e início do XX)*, «Educar em Revista», vol. 35, n. 76, July/August 2019, pp. 31-50.

[17] Escolano Benito, *Etnohistória e Cultura Material da Escola: A Educação nas Exposições Universais*, cit., pp. 93-94.

[18] D. Poulot, *Uma Nova História da Cultura Material?*, in Gaspar da Silva, de Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, cit., pp. 67-91, in partic. p. 80.

[19] For example, we highlight the thesis of Gustavo Rugoni de Sousa, *A (re)invenção do mobiliário escolar: entre saberes pedagógicos, higienistas e econômicos (1851-1889)*, Doctoral Thesis, Graduate Program in Education of the State University of Santa Catarina – UDESC, (supervisor: Vera Lucia Gaspar da Silva), Academic Year 2019. Available at: <https://drive.google.com/file/d/1bbGkTdBlv-J--e6vc2Lqkcm-i34YG5CH/view> (last access: 30.10.2019).

for commercializing the consecration of a way of life in which industrialized products are a vector, as they were for schools. We thus see that technological and industrial development is also expressed in school content. Whether in teaching books, in syllabuses or in textbooks, the marks of this content can be identified, and often helped construct a positive image of schools, as institutions «fine-tuned» with progress and receptive to the greatest innovations man could create.

Martin Lawn[20] invites us to see the «classroom as a construction of a social technology», an expression of changes in the social organization that demanded new tasks of the schools. Lawn emphasizes that many of the narratives about the grandiosity and efficiency of the «well equipped» schools were constructed by the suppliers of educational material.

The research can also be guided by the «role of the press and other media as vehicles of mass circulation of information about artefacts», considering the history of consumption, in this case of school objects, whether by individuals, institutions or their suppliers (like the state). The function of the press would be twofold: as a source, which guides the eye to aspects of material applications and circulation, and as an object of research, which reveals dimensions about the conditions and modes of production, and about the producers of discourse and practices. We are referring to commercial consumption. In keeping with this perspective, we have used advertisements found in the press as multiple sources of debate about material school culture. In addition to providing information about the artefacts promoted and sold[21], tracking the paths from producers to multiple forms of consumption offers a broad path for research.

«Distance between academic pedagogy and the global enthusiasm for educational technologies» disseminated and sold in different formats at the Universal Expositions and by sales representatives. According to Agustín Escolano, in the late 19th century and early 20th century,

> […] the academic pedagogy, found in normal schools and some universities at the time, did not share this enthusiasm, and took refuge in speculative discourses of little theoretical or practical value. Indeed, normal schools had little presence, and appeared rather late, in these fairs. This observation announced the secular division between empirical culture and academic culture which would be constant until today[22].

[20] M. Lawn, *A Materialidade Dinâmica da Educação Escolar: Professores, tecnologias, rotinas e trabalho*, in V.L. Gaspar da Silva, G. de Souza, C.A. Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*,(1st ed.), Vitória / Espírito Santo, EDUFES / Coleção Horizontes da Pesquisa em História da Educação no Brasil, 2018, pp. 341-365.

[21] See H. Scaravelli, *Objetos à Venda: Indícios da comercialização de materiais escolares em jornais catarinenses (1908-1921)*, Master's Dissertation defended in the Graduate Program in Education of the State University of Santa Catarina, Academic Year 2016.

[22] Escolano Benito, *Etnohistória e Cultura Material da Escola: A Educação nas Exposições Universais*, cit., p. 104.

This is an important topic to address and reveals a certain standardization and homogenization of school contents, and the attribution of a regulatory role to school bureaucracies that would limit an autonomy that teachers previously enjoyed. While on one hand the regulations established by educational legislation were essential to both consolidate the teaching profession and ensure the right to access schools, on the other hand it removed autonomy from teachers, establishing bureaucratic systems and extremely coercive rules of conduct. This standardization was supported by laws and discourses, which determined forms for bodies and defined parameters for the moral and political behavior of the citizens that the popular school sought to educate, and which teachers should implement[23].

Another promising perspective is the «tracking and analysis of flows of teaching materials and books as ways of operating and understanding schooling processes». Here, the perspective is adopted that the objects provide indications about school contents and practices. As Valdeniza da Barra warns,

> The itinerary of classroom production as a basic cell of modern school space came about from the establishment of processes that involve the dissemination of reading and writing among the popular classes, the institution of the public school and the need to produce a method of organization expressed in the basic material tools required for the profession of teaching and learning to read, write and do arithmetic[24].

While on one hand research that focuses on school textbooks as their source has significantly expanded in recent decades, studies dedicated to other objects that support education are less common and require investment. Working in this direction, Valdeniza da Barra points out that the «relationship between materials and methods can express educational concepts». By conferring «[…] centrality to the blackboard as the technology that, inscribed in the group of school practices, will result in the establishment and consolidation of the school model of the simultaneous transmission of education»[25], the author traces the trajectory of the insertion of the school blackboard as a pedagogical apparatus and reveals questions that pave the way for other analysis.

Another form of analysis that deserves attention is that which considers the objects and forms of exposition found in «memory storage spaces», to contribute to the construction of a narrative. «The forms of exhibiting artefacts in school museums, memory centers and similar facilities construct narratives

[23] A discussion on this topic can be consulted in V.L.Gaspar da Silva, *Sentidos da Profissão Docente: estudo comparado acerca de sentidos da profissão docente do ensino primário, envolvendo Santa Catarina, São Paulo e Portugal na virada do século XIX para o século XX*, Doctoral Thesis, Post-Graduation Programme in Education at the University of São Paulo, (supervisor: Denice Barbara Catani e António Nóvoa), Academic Year 2004.

[24] V.M. Lopes da Barra, *A lousa de uso escolar: traços da história de uma tecnologia da escola moderna*, «Educar em Revista», n. 49, July/September, 2013, p. 122.

[25] *Ibid*., p. 121.

about the past of schools» that is often ungrounded. We can risk affirming that they often present a certain unconnected overlapping of pieces from different origins and times, which entangle viewers and lead them to a «misguided» history, considering it is «imaginary»[26]. Obviously, this is not a question of criticizing these spaces that have invaluable worth, but rather a warning that the exhibits should be anchored in research and readers should be informed that they are a simulation and not a replica of how things were.

Appropriating the question raised by Dominique Poulot, who asks: «how can we go from the pure and simple finding of the presence or absence of goods in these places to an explanation of conduct?»[27], we believe this is another line of study of material school culture, or, more precisely, of a school culture stimulated by the presence and or absence of the material supports deemed to have central importance for children's schooling. This perspective is in accordance with the argument presented by Eliane Peres and Gizele de Souza, that,

> […] analysis of the material school culture cannot be confined to the study of the artefact itself. In other words, it is necessary to understand that the meanings are not only in the objects, but in the conducts, values and meanings attributed by the subjects who use them[28].

In this task of examining conduct related to the absence and presence of materials, it is interesting to think about the mechanisms that produce and disseminate these pedagogical instruments.

Along these lines we highlight the work of Inés Dussel that reflect on the material culture as a form of giving life and voice to common subjects through the tracks of their experiences in and with the objects. According to this author,

> […] things and objects not as signs representing people or «realities», or as fully defined and static beings, but as «devineres» never fully realized, and as participants in parity with the conditions of the networks of actors that make up the social scope[29].

[26] A text that helps deepen this line of reflection is: C. Yanes Cabrera, G. Trigueros Gordillo, *La patrimonialización de la cultura escolar en España: discursos y escenarios*, in Gaspar da Silva, de Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, cit., pp. 157-179. We can also highlight the reflection by Roberto Sani from a speech given at the 8th SEPHE Scientific Meetings and 1st SIPSE National Congress, held together in Palma de Mallorca in November 2018: R. Sani, *L'implementazione della ricerca sul patrimonio storico-educativo in Italia: itinerari, priorità, obiettivi di lungo termine*, in S. González, J. Meda, X. Motilla, L. Pomante (edd.), *La Práctica Educativa. Historia, Memoria y Patrimonio*, Salamanca, FahrenHouse, 2018, pp. 27-44.

[27] D. Poulot, *Uma Nova História da Cultura Material*?, in Gaspar da Silva, de Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, cit., pp. 77-78.

[28] E. Peres, G. de Souza, *Aspectos teórico-metodológicos da pesquisa sobre cultura material escolar (im)possibilidades de investigação*, in Castro (ed.), *Cultura Material Escolar*: *a escola (MA, SP, PR, SC e RS, 1870-1925)*, cit., pp. 55-56.

[29] I. Dussel, *Objetos, Imágenes Y Tecnologías como fuentes para la Historia de la Educación: Reflexiones desde una práctica de investigación*, in Gaspar da Silva, de Souza, Castro (edd.), *Cultura Material Escolar em Perspectiva Histórica: Escritas e Possibilidades*, cit., p. 328.

In addition to those mentioned, another no less important perspective is one that acknowledges that the «supply of materials from and to schools was shaped by the important positions» taken by pedagogues, inspectors, educational authorities, medical doctors, industrialists and businessmen who disseminated their ideas through the daily press, magazines in different fields (pedagogy, medicine, architecture), in national and international congresses, in journeys, catalogs, pedagogical museums, Universal Exhibits, among others. This lexical repertoire that historically designed and qualified school material supplies was broadened along different routes that involved large-scale events such as exhibitions, as well as other means of dissemination such as educational magazines and pedagogical congresses, in an amalgamation that produced certain meanings, expectations and representations about primary school and its material composition.

2. *Final Remarks*

Through our incursions we have shared the idea that material school culture can be analyzed based on the buildings, books, furniture, teachers' didactic materials, student materials, uniforms, and industrialized or artisan artefacts. But the analysis of this materiality requires methodological and theoretical guidance. Therefore, we understand that in the analysis of schooling through the perspective of material culture, a perspective that considers objects as exotic representations of the past should not dominate a reflection that looks at the objects as components of an empirical culture of the school in the terms conceived by Agustín Escolano Benito[30]. A merely curious glance sees many of these objects as materialities of a stereotyped school and reiterates a narrative that is not supported by a more in-depth reading. Therefore, we believe it is necessary to re-constitute the contexts of production, circulation and appropriation of the materialities, as paths that allow addressing them as elements that constitute and participate in schools and educational processes. For example, the fact that a cane is found in a school basement does not allow affirming that the institution punished students with this artefact. It may have been hidden in the basement to prevent its use. But it is an indication of the existence and circulation of this object in a given time and place, intertwined with different forms of appropriation.

We also deem it appropriate to reaffirm that we cannot naively believe that all schools received the same artefacts, and had a uniform material composition.

[30] Agustín Escolano Benito dwells on this reflection with special attention on a paper which in Brazil was entitled *A Escola como Cultura: Experiência, memória e arqueologia*, Campinas/SP, Editora Alínea, 2017.

Nevertheless, it is possible to understand that ideas about what schools should be like were designed from the point of view of the material supplied to them, and that the presence or absence of the «standard template» gave rise to qualifying or disqualifying an institution and the subjects who attended it, contributing to the construction of an idea of primary schooling, childhood and teaching.

Finally, we identified that one of the points of tension is how material culture is understood and mobilized. For some, it is represented by an object itself, for others it is the expression of practices carried out with the objects through human action, i.e. the expression of culture. The most common convergence is the premise that the objects can be studied individually or by forming a collection, but, as a rule, whether they are used individually or collectively, they gain meanings through their relation to the subjects. Along these lines, we can adopt the thinking of Certeau[31] (2012) to consider the place that these relations occupy in the network of subjects, artefacts and contexts of production.

There is a strong challenge to confront the debate, to accept different perspectives, which can pave the way and contribute to new avenues for understanding the historical constitution of schools based on their materiality.

[31] M. Certeau de, *A invenção do cotidiano*, (19ª ed.), Rio de Janeiro, Vozes, 2012.

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Teaching material catalogues as a source for studying educational practice in natural science in Spain (1882-1936)

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ABSTRACT: The study is based on the hypothesis that commercial catalogues of teaching materials are a fundamental source for historical research into the materials used in academic institutions, the production and distribution of equipment, and the teaching resources for educational practices. This paper covers a key period of Spanish educational history and seeks to set out, first, the concept and distinctive features of this source and offer a historiographic approach to the uses made of it. Secondly, it aims to analyse the characteristics of the sample studied and, thirdly, to examine the types of materials offered for the teaching of natural sciences, their emergence and evolution, as well as their introduction, dissemination and uses in Spanish secondary schools.

EET/TEE KEYWORDS: History of education; Material culture; Catalogues of teaching materials; Natural sciences; Educational practices; Spain; XIXth-XXth Centuries.

Introduction

The renewal of educational historiography experienced during the last part of the last century ran parallel to the progressive assumption by education historians of the new theoretical and methodological conceptions generated in

the field of general history. During the 1990s, new emerging historiographic trends enriched and further diversified the viewpoints of the study of education in the past. One of the contributions which was widely accepted and developed arose from the proposal made by Dominique Julia in 1995 to consider school culture as a historical object[1]. Marc Depaepe and Frank Simon highlighted the heuristic potential of this new historiographic approach to enter into the knowledge of educational practices in the «domain of chalk», of the «black box» that constituted the daily reality of schools[2].

Antonio Viñao would go more deeply into the conceptual definition of «school culture» and propose among its most visible elements the actors, the discourses, the organizational and institutional aspects, as well as the material culture that would bring together «its physical and material environment and objects (built and unbuilt spaces, furniture, teaching and school materials, etc.)»[3]. The new cultural history, mainly through its ethnographic and micro-historical lines, has been shaping a new historiographic field around the study of the materialities of schools, in their cultural meanings, to then structure a holistic historical perspective capable of studying the uses of objects, their links with each other, their relationships with the actors and empirical practices. The material culture of educational institutions, in their many manifestations, has come to be valued by the new educational historiography as a fundamental reference for knowing the past of the school in its practical and discursive dimensions[4].

Addressing the study of the material culture of educational institutions during the last decades of the XIXth century and the first third of the XXth century requires taking into consideration, at least, the factors inherent to the profound changes in educational systems, as well as the transformations set off in specialized industrial and commercial sectors. The processes of expansion and consolidation of national education systems, experienced during the XIXth and XXth centuries, scientific advances and technological changes, contributed to stimulating, directly or indirectly, the emergence and exponential expansion of an industrial and commercial sector specializing in the production and distribution of an increasingly broad range of teaching materials, As Pierre Mœglin[5] would point out, «education industries» whose existence, whose

[1] D. Julia, *La culture scolaire comme objet historique*, in *Colonial Experience in Education. Historical Issues and Perspectives*, «Paedagogica Historica», Supplementary series, vol. I, 1995, pp. 353-382.

[2] M. Depaepe, F. Simon, *Is There any Place for the History of "Education" in the "History of Education"? A Plea for the History of Everyday Educational Reality in-and Outside Schools*, «Paedagogica Historica», vol. XXX, n. 1, 1995, pp. 9-16.

[3] A. Viñao, *Sistemas educativos, culturas escolares y reformas*, Madrid, Morata, 2002, p. 73.

[4] A. Escolano Benito, *Etnohistória e cultura material da escola: a educação nas Exposições Universais*, in V. Gaspar, G. de Souza, C. Castro (edd.), *Cultura material escolar em perspectiva histórica: escritas e posibilidades*, Vitória, Edufes, 2018, pp. 93-118.

[5] P. Mœglin, *Les industries éducatives*, Paris, Presses Universitaires de France-PUF, 2010.

survival and prosperity depended, among other factors, on their ability to stimulate and meet a growing and heterogeneous national and international demand for teaching materials and resources.

Studying the material history of educational institutions involves multidisciplinary approaches, interpretative categories, methodological models and research sources from other historiographical fields. This study is based on the hypothesis that commercial catalogues of teaching materials constitute an important source for the historical research of the elements comprising the material culture of educational institutions, of the teaching equipment and resources that, beyond their pedagogical nature, are also industrial and consumer products. Although school material, in general, and scientific and pedagogical material, in particular, constitute an indicator of educational intentions and proposed teaching models[6], we will need to draw on other sources, such as inventories of existing collections in former historical institutes or their institutional memoirs, in order to learn about the reception of such materials in educational centres, the pedagogical conceptions of teachers and their effective use in academic practice.

The research looks at a key period in Spanish contemporary educational history, from the founding of the National Pedagogical Museum in 1882, which played a leading role in the process of renewal and modernization of teaching materials in Spain[7], to the start of the Spanish Civil War in 1936, which would cause a deep rift in all orders. The study starts from the analysis of the commercial catalogues of teaching material existing in the Centre for Studies on Educational Memory of the University of Murcia (CEME). The sample includes a wide range of catalogues published by both commercial firms in Spain and by production or distribution companies in other countries which were written or translated into Spanish, and aimed at Spanish and, where appropriate, Latin American teachers and educational centres.

The study aims to address the following objectives. Firstly, to define the concept and distinctive features of the source, as well as to make a historiographic approach to the uses that have been made of it from the history of education. Secondly, to analyze the characteristics of the sample studied. Thirdly, we will focus our study on examining the types of materials offered for teaching natural sciences, their emergence and disappearance, their changes and continuities, as

[6] J.D. López Martínez, M.A. Delgado Martínez, *El material científico de los institutos como indicador de intenciones pedagógicas y modelos de enseñanza en ciencias experimentales*, in *Etnohistoria de la escuela. XII Coloquio nacional de Historia de la Educación*, Burgos, Servicio de Publicaciones de la Universidad de Burgos, 2003, pp. 181-192.

[7] P.L. Moreno Martínez, *El Museo Pedagógico Nacional y la modernización educativa en España (1882-1941)*, in J. García Velasco, A. Morales Moya (edd.), *La Institución Libre de Enseñanza y Francisco Giner de los Ríos: Nuevas perspectivas. 2. La Institución Libre de Enseñanza y la cultura española*, 3 vols., Madrid, Fundación F. Giner de los Ríos [Institución Libre de Enseñanza] / Acción Cultural Española, 2012, Vol. 2, pp. 458-475.

well as, where appropriate, the teaching innovation processes related to them, their introduction, dissemination and uses in Spanish classrooms in secondary schools.

1. *Catalogues of teaching materials: towards a terminological and historiographical delimitation*

The Industrial Revolution brought about profound changes in that now goods were produced, distributed and consumed. The steam engine not only led to an increase in factory productivity, but also to the transformation of transport systems, the emergence of the railway, and the possibility of promoting new formulas for the distribution of the goods produced. Manufacturers focused on the marketing and sale of their products, on which the movement of their goods and business success depended. As commercial activity became more complex, mass advertising and new sales systems, such as mail order and catalogue sales, were developed[8]. The production, distribution and consumption of the «mass education media»[9] would not be exempt from these industrial and commercial dynamics. Catalogues of teaching resources became one of the strategies promoted by the education industries and the specialist commercial houses to disseminate and sell their products.

Beyond the etymology and meaning of the term «catalogue», the diversity of potential fields of use of this term, in areas proper to library science, documentation or commerce, calls for a conceptualization in accordance with the peculiarities of the catalogues considered. One of the fundamental characteristics of catalogues of teaching materials lies in their advertising and commercial purposes. Therefore, the relevant areas of knowledge, from which a conceptual approach to this type of catalogues can be made, are those that relate to trade and marketing.

The conceptual delimitations and the fundamental characteristics that specialists in marketing attribute to the word «catalogue»[10], or as Miguel Santesmases specifies «catalogue of products»[11], are clarifying. Taking as a reference these contributions, and the nature of the objects advertised, we can

[8] I. Solanas García, *Orígenes de la publicidad moderna (1800-1925)*, Berlín, Académica española, 2011, pp. 205-206.

[9] J. Meda, *Mezzi di educazione di massa: nuove fonti e nuove prospettive di ricerca per una storia materiale della scuola*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 253-279.

[10] M. Elosúa (dir.), *Diccionario empresarial Capital*, Madrid, Lid, 1997; M.A. Sastre Castillo (ed.), *Diccionario de dirección de empresas y marketing*, Madrid, Ecobook, 2009, p. 38.

[11] M. Santesmases, *Términos de marketing: Diccionario-Base de datos*, Madrid, Pirámide, 1996, p. 146.

gain a first idea of the essential characteristics that teaching material catalogues must possess to be considered as commercial or product catalogues:

> they must be printed lists in the form of a book, magazine or brochure, published at specific intervals or on an ad hoc basis, produced and disseminated for advertising purposes by institutions, companies or persons engaged in production, distribution and/or sale, either wholesale or directly to the consumer, of all types of resources for school or educational use, of any level or modality, in which the features of all or part of their products are presented and described, in greater or lesser detail, with or without photographs or illustrations and indicating prices and, where appropriate, conditions of sale to the public and payment[12].

Since the turn of the century catalogues of teaching materials have been attracting the attention of the historiography of education in Spain as a source of historical knowledge. The seminal study by Professor León Esteban, published in 1997, deserves special mention, since it began to show their research potential in various areas of the history of education[13].

A succinct approach to Spanish historiography offers a snapshot of the main fields of study addressed. School furniture was one of the first subjects found in the catalogues as a potential source of historical knowledge. Its exploitation allowed us to undertake an analysis of certain characteristics of the offer and the transformations to school desks or teachers' furniture from the last decades of the 19th century to the middle of the 20th century[14]. Secondly, we should mention the studies carried out on one of the most important commercial companies specialising in the distribution of school material in the country in the 20th century – *Casa Cultura*[15]. Another source studied on account of its collection of

[12] P.L. Moreno Martínez, A. Sebastián Vicente, *Los catálogos de material de enseñanza y la cultura material de la escuela. La colección del Centro de Estudios sobre la Memoria Educativa (CEME) de la Universidad de Murcia*, in P.L. Moreno, A. Sebastián (edd.), *Patrimonio y Etnografía en España y Portugal durante el siglo XX*, Murcia, Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (SEPHE) y Centro de Estudios sobre la Memoria Educativa (CEME) de la Universidad de Murcia, 2012, pp. 296-297.

[13] L. Esteban, *Los catálogos de librería y material de enseñanza como fuente iconográfica y literario-escolar*, «Historia de la Educación», n. 16, 1997, pp. 17-46.

[14] L. Esteban, *El mobiliario escolar o la evolución de la arqueología material de la escuela en España (1875-1945)*, in *La escuela en Elche. Una mirada histórica al mundo de la enseñanza*, Elche, Museo Escolar Agrícola de Pusol, 2000, pp. 267-296; P.L. Moreno Martínez, *El mobiliario escolar en los catálogos de material de enseñanza: consideraciones metodológicas*, in P. Dávila, L.M. Naya (edd.), *La infancia en la historia: espacios y representaciones*, 2 vols., San Sebastián, Erein, 2005, Vol. 1, pp. 342-355; P.L. Moreno Martínez, *History of School Desk Development in Terms of Hygiene and Pedagogy in Spain (1838-1936)*, in M. Lawn, I. Grosvenor (edd.), *Materialities of Schooling: Design – Technology – Objects – Routines*, Oxford, Symposium Books, 2005, pp. 71-95.

[15] P.L. Moreno Martínez, J.P. Marín Murcia, *La casa comercial Cultura y la oferta de Material Pedagógico Moderno en España (1924-1934)*, in A. Badanelli, M. Poveda Sanz, C. Rodríguez (edd.), *Pedagogía museística. Prácticas, usos didácticos e investigación del patrimonio educativo*, Madrid, Universidad Complutense de Madrid, 2014, pp. 523-531; P.L. Moreno Martínez, A. Sebastián Vicente, *Imagen, educación y marketing en los catálogos de material de enseñanza de la casa comercial Cultura (1924-1972)*, in P.L. Moreno, A. Viñao (edd.), *Imagen y educación.*

teaching material catalogues was the CEME of the University of Murcia[16]. The most significant set of works relates to the study of the production, reception and commercial distribution of a wide range of educational resources in our country. We refer here to the materials used to teach writing[17], those which used the Froebel method[18], and also to certain teaching resources and means that are relevant to the history of education of mathematics, such as abacuses[19] or the games of Ovide Decroly[20], not to mention a wide range of scientific teaching materials distributed by other Spanish commercial houses[21] or by the French one, *Les Fils d'Émile Deyrolle*[22].

International educational historiography has also used catalogues of teaching materials as a source of knowledge of the material culture of the school and particularly noteworthy are the contributions from Italy. The catalogues have been one of the main sources used to base, conceptualize and delimit what Juri Meda named the «mass educational media» as a new historiographic category based on the interpretation of educational media considered as objects designed, produced, distributed and consumed in an expanding school market that, during the 19th and 20th centuries, became mass[23]. At the same time, they have also been one of the fundamental sources used to carry out a general study

Marketing, comercialización y didáctica (España, siglo XX), Madrid, Morata, 2017, pp. 155-175.

16 Moreno Martínez, Sebastián Vicente, *Los catálogos de material de enseñanza*, cit., pp. 293-309.

17 L. Esteban, *La academización de la escritura. Modelos e instrumentos para aprender a escribir en la España del siglo XIX y comienzos del XX*, in A. Escolano Benito (ed.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 315-344, reference on pp. 338-339.

18 M.J. Martínez Ruiz-Funes, *Los catálogos de material escolar como fuente para el estudio de la cultura material: la recepción y difusión del Método Froebel en España*, in P.L. Moreno, A. Sebastián (edd.), *Patrimonio y Etnografía en España y Portugal durante el siglo XX*, Murcia, Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (SEPHE) and Centro de Estudios sobre la Memoria Educativa (CEME) de la Universidad de Murcia, 2012, pp. 265-277.

19 D. Carrillo Gallego, *Los catálogos de material escolar como fuente de la Historia de la Educación Matemática: el caso de los ábacos*, «Historia y Memoria de la Educación», n. 7, 2018, pp. 573-613.

20 D. Carrillo Gallego, A. Maurandi López, P. Olivares Carrillo, *Los juegos decrolyanos en los catálogos de material en España (1920-1936)*, in L. Grosso Correia, S. Poças (eds.), *ISCHE 41. Spaces and places of education. Book of Abstracts*, Porto, 2019, pp. 20-21, <https://www.fpce.up.pt/ische2019/pdf/ISCHE41_BookofAbstracts.pdf> (last access: 29.09.2019).

21 J.D. López Martínez, J.M. Bernal Martínez, *El material de enseñanza como recurso didáctico en la Historia de la Educación*, in *El Patrimonio histórico-educativo y la enseñanza de la Historia de la Educación*, Murcia, Sociedad Española de Historia de la Educación, 2009, pp. 53-92, in partic. in pp. 74-78; J.P. Marín Murcia, *El material científico para la enseñanza de la botánica en la Región de Murcia (1837-1939)*, Doctoral Thesis, Departamento de Didáctica de las Ciencias Experimentales, (Supervisors: J.M. Bernal Martínez, J.D. López Martínez), Murcia, University of Murcia, Academic Year 2014-2015.

22 J.P. Marín Murcia, *La enseñanza de la Botánica y los modelos anatómicos de Les Fils d'Émile Deyrolle*, «Aula, Museos y Colecciones», n. 5, 2018, pp. 113-130.

23 Meda, *Mezzi di educazione di massa: nuove fonti e nuove prospettive di ricerca per una storia materiale della scuola*, cit., pp. 261-279.

of the material culture of the Italian school in the 19th and 20th centuries, of its school industry, its furniture and teaching means, which are so important for the daily life of the schools, such as desks, notebooks or school diaries[24]. We have also drawn on the catalogues, mostly from the commercial houses of Paravia (1864-1934) and Vallardi (1902-1910), to determine the main periods of the industry and commercial distribution of these media in Italy[25].

2. *Catalogues of teaching materials: features of the sample studied*

Commercial catalogues of teaching materials have not been kept on library shelves as much as would have been desirable. The inherent characteristics of this type of publication, normally not very extensive, with a weak binding, distributed free of charge, condemned it to a fleeting life. It was cancelled and discarded when a new copy updated the products offered. Most of the sample studied belongs to the collection of the CEME of the University of Murcia. The selection criteria were based on the objectives. Firstly, chronologically, the commercial catalogues considered had to have been published between 1882 and 1936. Secondly, in terms of content, they had to meet one of the following requirements: to have sections or sections of teaching materials, apparatus, utensils, or specific equipment intended for the teaching of natural sciences in secondary schools. Thirdly, regardless of the country in which they were published, the sample was limited to those printed in Spanish.

The sample selected according to these criteria comprises 20 catalogues. These were published between 1910 and 1935 by 13 industrial or commercial companies, of which eight were Spanish and the remainder were from three other countries. Of the 14 catalogues published in Spain, the prolific Cultura estabished in Madrid in 1924 accounted for the most, with five catalogues published between 1927 and 1934[26]. The Librería Escolar Antonio Pérez, also

[24] Id., *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016.

[25] M. Brunelli, *Posibles metodologías de trabajo histórico sobre la cultura material de la escuela: entre el material didáctico y los catálogos de enseñanza – Primeros resultados de una investigación en curso*, in V. Gaspar, G. de Souza, C. Castro (edd.), *Cultura material escolar em perspectiva histórica: escritas e posibilidades*, Vitória, Edufes, 2018, pp. 181-215.

[26] Cultura, *Catálogo de material pedagógico moderno. Tomo II. Ciencias Naturales*, Madrid, Cultura - Eimler-Basanta-Haase S.L., 1927; Cultura, *Catálogo de material pedagógico moderno. Tomo IV. Proyección*, Madrid, Cultura - Eimler-Basanta-Haase S.L., 1927; Cultura, *Material de enseñanza. Resumen general. Catálogo VI*, Madrid, Cultura - Eimler-Basanta-Haase S.L., 1927; Cultura, *Catálogo XX. Material pedagógico para institutos, escuelas normales, escuelas nacionales y demás centros docentes*, Madrid, Cultura - Eimler-Basanta-Haase S.L., 1932; Cultura, *Catálogo 30. Material pedagógico moderno: para Universidades, Institutos, Escuelas Normales, Escuelas Nacionales y demás Centros docentes*, Madrid, Cultura – Eimler-Basanta-Haase S.L., 1934.

based in Madrid, accounts for two catalogues, printed in 1911 and 1930[27]. The rest of the entities considered have a single catalogue each. Three of them were also in Madrid – Voluntad (1920?), Magisterio Español (1930) and Espasa-Calpe (1934)[28] – and the others in Catalonia. In Barcelona we find Areny de Plandolit (1910), Bazar Ibérico (1914) and Librería y casa editorial Perelló y Vergés (1915), and from Gerona, Dalmáu Carles (1935)[29].

Industrial houses and distributors from other European and American countries carried out an important commercial activity to spread their teaching material in a growing international school market. The translation and edition of catalogues in Spanish was part of their commercial strategies to make their products known in Spain and Latin America. At the beginning of the 20th century, the German industry was particularly dynamic in the production and distribution of specialised teaching materials. Among the catalogues that form part of the exhibition are four copies of German origin published, in three cases, before the WWI, by J.F. Schreiber (1910?), K.F. Koehler (1910?) and Volckmar (1910), the latter two from Leipzig and, after the war, a fourth signed by the apparently then associated firms Koehler & Volckmar (1928)[30]. We also have the catalogue published by the Louis-Michaud Publishing Company in Paris (1912?) and that of the American company Vellvé, based in New York (1920?)[31].

[27] Librería Escolar Antonio Pérez, *Catálogo ilustrado de material de enseñanza, objetos de escritorio y dibujo*, Madrid, Librería Escolar de Antonio Pérez, 1911; Librería Escolar Hijos de Antonio Pérez, *Catálogo ilustrado la librería escolar*, Madrid, Librería Escolar hijos de Antonio Pérez, 1930.

[28] Voluntad, *Material Pedagógico y Científico. Boletín de Información. Colecciones de Historia Natural*, Madrid, Voluntad, 1920?; Magisterio Español, *Catálogo de material pedagógico moderno. Resumen general*, Madrid, Magisterio Español, 1930; Espasa-Calpe, *Catálogo de material de enseñanza*, Madrid, Espasa-Calpe, 1934.

[29] Areny de Plandolit, *Catálogo ilustrado de modelos de anatomía*, Barcelona, Areny de Plandolit, 1910; Bazar Ibérico, *Catálogo general ilustrado de material instructivo moderno para escuelas Elementales, Superiores, Normales y de Comercio, Institutos, Universidades y enseñanzas especiales*, Barcelona, Material Escolar y Científico S.A., 1914; Perelló y Vergés (Libreros y editores), *Catálogo general ilustrado de material de enseñanza y librería*, Barcelona, Perelló y Vergés, 1915, Dalmáu Carles, Pla, *Catálogo de material escolar número 37*, Gerona, casa editorial Dalmáu Carles, Pla. S.A., 1935.

[30] J.F. Schreiber, *Catálogo ilustrado. Láminas murales para escuelas*, Schreiber, Esslingen, 1910?; Koehler, *Catálogo ilustrado de material de enseñanza. Lista de los aparatos y útiles más modernos y adecuados para la enseñanza objetiva, aprobados y en uso en las escuelas de Alemania*, Leipzig, Koehler, 2nd ed., 1910?; F. Volckmar, *Catálogo general con un sinnúmero de grabados e ilustraciones en colores de material de enseñanza y útiles para escuelas*, Leipzig, F. Volckmar, 1910; Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno. Material y utensilios seleccionados cuidadosamente para Escuelas, Institutos y Universidades de España y de América Central y Meridional*, Leipzig, Koehler & Volckmar, A.-G. & Co., 3rd ed., 1928.

[31] Sociedad de Ediciones Louis-Michaud, *Catálogo ilustrado de material de educación moderna e integral*, Paris, Sociedad de Ediciones Louis-Michaud, 1912?; J. Vellvé Company, *Catálogo de material escolar*, New York, J. Vellvé Company, Inc., 1920?

The analysis of this sample of catalogues reveals certain characteristics. First, with regard to their «content», it should be noted that only four catalogues have both bibliographic sections and teaching materials. These are those published by the Antonio Pérez bookshop in Madrid (1911 and 1930), Perelló y Vergés (1915) in Barcelona and Volckmar in Leipzig (1910). The rest of the catalogues offered only teaching material.

The catalogues offering only teaching material can be separated into «general» and «specialized» catalogues. The former, which include 11 of the 16 existing catalogues, cover various forms of teaching materials. The remaining five, the «specialist» catalogues, contain, just one type of material. These are the catalogue of Dr. Pau Xavier Areny de Plandolit, a naturalist doctor and assistant lecturer at the Faculty of Medicine of the University of Barcelona, who ran a workshop specialising in the preparation and sale of «anatomy models»; the catalogue of «wall charts» published by F. Schreiber in Germany around 1910; and the catalogue published by the Casa Cultura in 1927, devoted to «Projection». The other two deserve special mention as they are directly related to the field of natural sciences. They are those of the publishing house Voluntad, around 1920, of «Natural History Collections», and Cultura, in 1927, devoted to «Natural Sciences». In the latter case, it should also be noted that it is the only catalogue in the sample expressly devoted to secondary education. This was in response to the requirements of the new syllabus in secondary schools[32], the so called Plan Callejo, passed by Royal Decree on August 25, 1926, a few months before the catalogue appeared.

Among the most noteworthy features of the format and presentation of the catalogues, the following stand out. Most had a conventional format, standard dimensions, about 23x16 cm, and a paperback binding. However, some received more detailed attention. These were one-off editions of a clearly promotional nature of events which the companies wished to commemorate, such as a first edition in a new venture[33], an anniversary[34] or merely to show their customers their academic competence in one of their projects[35]. These catalogues were larger, used better quality paper and printing, had more illustrations, some in colour, had hard covers, more pages and more ambitious and detailed content. The length varied considerably. The average number of pages of the 20 catalogues is 197. This figure varies for the two subcategories of catalogues considered according to their content, namely «general» catalogues and «specialized» catalogues. The former were above average in length, with 242 pages, but there were considerable differences between those published in

[32] *Instituto* is the term used in Spain for state secondary schools as established in the Plan Pidal of 1845 (J.I. Cruz, *Los institutos de segunda enseñanza en España. Datos sobre su implantación (1835-1936)*, «Educatio Siglo XXI», vol. 30, n. 1, 2012, pp. 234-236).

[33] Bazar Ibérico, *Catálogo general*, cit.; Perelló y Vergés, *Catálogo general*, cit.

[34] Cultura, *Catálogo 30*, cit.

[35] Louis-Michaud, *Catálogo ilustrado de material de educación moderna e integral*, cit.

Spain, with 191 pages, and those published abroad, with 330 pages, although the spread was considerable, from the 56 pages of a copy of Cultura to the 596 pages of the volume by L. Michaud. The latter, the five «specialized» catalogues, were at the opposite end of the spectrum, with an average number of 26 pages and with little variation regardless of the publishing house or their nationality.

3. *Types of material offered for teaching natural sciences*

To access the information in the catalogues, it is best to examine category by category given the diversity of material and uses. The first classification of material related to natural history is found in the Memoirs of the Pedagogical Museum of 1892, with details provided by its secretary Ricardo Rubio[36], who divided the resources into two classes: those that could be used directly and support materials. Among the former, Rubio names wall charts, herbaria, permanent microscope slides, photographs on glass for projections and, among the latter, the projector apparatus, microscopes, lenses, microtomes and botanical boxes.

Ruiz Berrio distinguished between wall charts, prints and other demonstration objects, or traditional material of an experimental nature which could be manipulated[37]. Hernández Díaz made the distinction between objects to be hung and seen, manipulative and dialogical, and those objects coming from the empirical or artisan school[38]. When classifying historical scientific instruments, one can also differentiate between observation and experimentation, or passive and active, instruments[39].

In the commercial catalogues studied we found that, in general, the materials are grouped into themes, unless dealing with a specific catalogue of a single theme or a material. Within natural history, which included mineralogy, botany and zoology, these were in turn broken down into collections of natural objects or naturalized living beings, plates and anatomical models. Thus, we have a first series of objects from nature organized taxonomically and didactically in natural history collections: naturalized animals (dissected or conserved in

[36] R. Rubio, *La Botánica y su enseñanza*, Madrid, Fortanet, 1892.

[37] J. Ruiz Berrio, A. Martínez, C. Colmenar, M. Carreño, *La editorial Calleja, un agente de modernización educativa en la Restauración*, Madrid, Universidad Nacional de Educación a Distancia, 2002, pp. 179-180.

[38] J.M. Hernández, *Etnografía escolar e historia de la educación*, in A. Escolano, J.M. Hernández (edd.), *La memoria y el deseo. Cultura de la escuela y educación deseada*, Valencia, Tirant lo Blanch, 2002, pp. 225-246.

[39] J.R. Bertomeu, A. García, *Abriendo las cajas negras: Los instrumentos científicos de la Universidad de Valencia. Guía didáctica de la exposición*, Valencia, Universidad de Valencia, 2002, p. 4.

liquid), collections of malacology, herbaria (plants, algae, bryophytes and ferns), minerals, rocks and fossils; a second, formed by the iconic or representational materials that showed nature in the classroom through pictorial representation (wall charts) and, finally, a third one for anatomical models or models (also called clastic models, provided that they could be separated into parts).

Apart from the thematic sections, coinciding with the different disciplines within secondary education, we found some general catalogues where there was also a section of furniture and another of projection devices, in which elements for use in natural history or natural science classes could be found. Despite being closely related to natural history, it was also usual to find a microscopy section together with other experimental laboratory equipment.

In order to study the appearance and disappearance of materials, it is necessary to compare the information in the catalogues with the memoirs of current institutes or cataloguing works to find evidence for the presence or absence of the materials offered in the catalogues. Detecting the presence or absence of such materials in the classrooms of historical schools is something that has not yet been in a complete manner, although we do have some valuable partial approaches to the rich legacy of the schools in the central district[40], as well as the Natural History collections of some schools, such as the *Instituto de Enseñanza Secundaria (IES) Bárbara de Braganza de Badajoz*[41] or the *Instituto de Murcia*[42].

3.1 *Natural History collections: natural objects and naturalised living beings*

Offers of large collections of naturalized animals were common, and they had their own sections or even special catalogues, like the Voluntad house in 1920. Stuffed animals were very attractive to students. Taxidermy was on the rise in education during the 19th century[43]. These reconstructions of nature were taken from their natural setting to a museum or to a teaching

[40] En la página web del proyecto CEIMES se pueden visitar los museos virtuales de los institutos históricos de Madrid, <http://ceimes.cchs.csic.es> (last access: 12.10.2019).

[41] Materials retrieved from the IES Bárbara de Braganza, the former Instituto Provincial de Badajoz, <http://iesbdebraganza.juntaextremadura.net/patrimonio/registros.php> (last access: 12.10.2019).

[42] J.P. Marín, *Efectos de una renovación educativa en la enseñanza de la Historia Natural del Instituto de Murcia a través del relato de su material científico*, in L. López-Ocón, V. Guijarro, M. Pedrazuela (edd.), *Aulas Abiertas. Profesores viajeros y renovación de la enseñanza secundaria en los países ibéricos (1900-1936)*, Madrid, Universidad Carlos III, 2018, pp. 191-218.

[43] S. Aragón, C. López, F.J. Frutos, *La enseñanza a través de las imágenes en el Instituto-Escuela*, in E. Martínez Alfaro, L. López-Ocón, G. Ossenbach (edd.), *Ciencia e innovación en las aulas. Centenario del Instituto-Escuela (1918-1939)*, Madrid, Consejo Superior de Investigaciones Científicas, 2018, p. 127.

model, like biological groups, dioramas and other recreations[44]. The Madrid Natural Sciences Museum supplied the secondary schools of Madrid[45] and in the provinces with new ready prepared collections, although the commercial houses offered good alternatives.

The nature collections of houses like Volckmar offered a large number of dissected animal species (vertebrates) in characteristic positions, others were preserved in alcohol, showing the internal anatomy enclosed in cylindrical vessels [Pic. 1], collections of shells, insects in series or showing their metamorphosis, mounted in wooden glass boxes [Pic. 2]. These paintings or biological preparations showed, apart from the metamorphosis, how these animals lived, with the intention of making the students aware of their conservation. These prepared collections were highly recommended for both schools and museums[46].

Stuffed animals began to lose importance in secondary education at the beginning of the 20th century, and school acquisitions decreased. A clear example of the decrease in stuffed animals is the case of the Instituto-Escuela de Madrid, where collections of naturalized animals became much less important, not necessarily due to a lack of resources, but to the change in pedagogical orientation which focused more on students' experimenting[47]. The catalogues of these samples after 1930 reflect this trend, with the absence or reduction of the collections on offer. The Dalmáu house, for example, offered small collections of birds and insects in 1935, with the emphasis on practical material for sampling in the field.

The catalogues of the commercial houses also offered a large number of themed glass boxes with plants or parts of plants which were distributed to be mounted on the classroom walls. The Cultura house had a collection of boxes with plants to study the classification of the natural botanical system, morphology, climbing plants, nutrition, fertilization and germination of seeds, among other functions[48]. As for material for herborization, a whole series of tools and materials for sampling and conservation were sold.

The already prepared herbariums were made up of plants that in many cases were not present in Spain, so they were hardly recommendabke for early

44 S. Casado, *Cápsulas de naturaleza. Colecciones, preparaciones y quimeras entre lo natural y lo artificial*, in E. Cervantes (ed.), *Encuentros con lo imposible. Homenaje a Isabel Izquierdo Moya*, Seattle, CreateSpace, 2017, pp. 93-120.

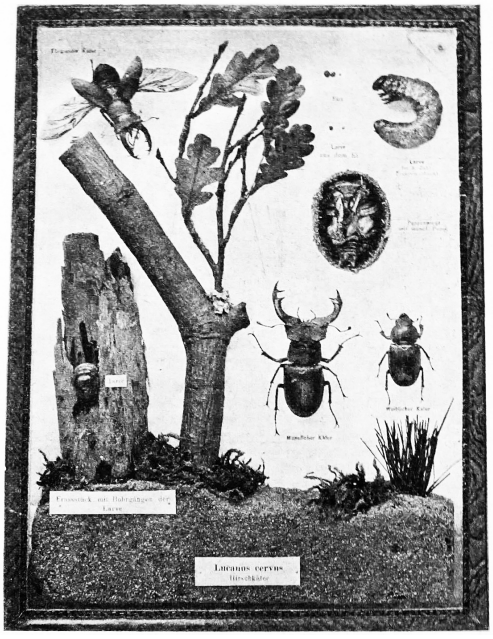
45 Both the Instituto Cardenal Cisneros and the San Isidro house extensive collections of stuffed vertebrates, and are the most interesting available after that of the Spanish National Natural Sciences Museum (Aragón, López, Frutos, *La enseñanza a través de las imágenes en el Instituto-Escuela*, cit.).

46 Volckmar, *Catálogo General*, cit., p. 163.

47 S. Aragón, *Historias de objetos que cuentan historias: plantas, rocas y animales en los institutos históricos madrileños*, in L. López-Ocón, S. Aragón, M. Pedrazuela (edd.), *Aulas con memoria. Ciencia, educación y patrimonio en los institutos históricos de Madrid (1837-1936)*, Madrid, CEIMES / Doce Calles, 2012, pp. 105-116.

48 Cultura, *Catálogo de material pedagógico moderno. Tomo II*, cit., pp. 15-16.

Pic. 1. Zootomic examples: freshwater fish and crayfish
(Koehler, *Catálogo ilustrado de material de enseñanza*, cit., p. 160)



Pic. 2. Metamorphosis of the stag beetle
(Volckmar, *Catálogo General*, cit., p. 164)

school years. Only in secondary or higher education could they make sense, although it was always much more recommendable for the students themselves to make their own. Houses like Dalmáu in 1935 or Espasa-Calpe in 1931 offered botanical collections with different types of species, pasted on strong paper. But, without doubt, the herbariums of the powerful German commercial houses like Volckmar in 1910 had more diversity and exoticism and offered thematic herbariums with species for technological use that were applied to food and medicine[49].

Another series of materials served to explain physiological experiences such as the different phases of germination in jars. Among other innovative products was the Rückert Forest collection, comprising preparations taken from the most important tree species of the German forests, which clearly represented all the transformations of these trees over the seasons. The collection contained polished cross sections, longitudinal sections with bark, polished boards, leaves, flowers, fruits, seeds, sprouts and buds of trees from Central Europe[50].

3.2 *Iconic or representative materials in the catalogues*

Wall charts, wax, glass, papier-mâché or plaster models have been among the most useful methods of illustrating nature in the classroom. They are reproductions of reality that constitute an important aid for teaching, solving the difficulties of the object of study, representing the «things» either larger or smaller in many forms, like a graphic plate, model, molded object, etc.[51]. These types of materials arose from the collaboration between naturalists and artists. Wall charts would be used in a variety of ways in science education[52]. They are a visual representation of the natural world in the classroom and are visible at large distances. The chats became very successful and popular, mainly for technical and educational reasons, but also because of their enhanced visibility.

Wall charts from the publisher Lutz in Stuttgart were among the most frequent in the catalogues [Pic. 3], and some are conserved at the Instituto Cardenal Cisneros in Madrid[53]. Täuber's zoological wall charts were also common in the institutes and repeatedly acquired by the Ministry of Education. The Instituto

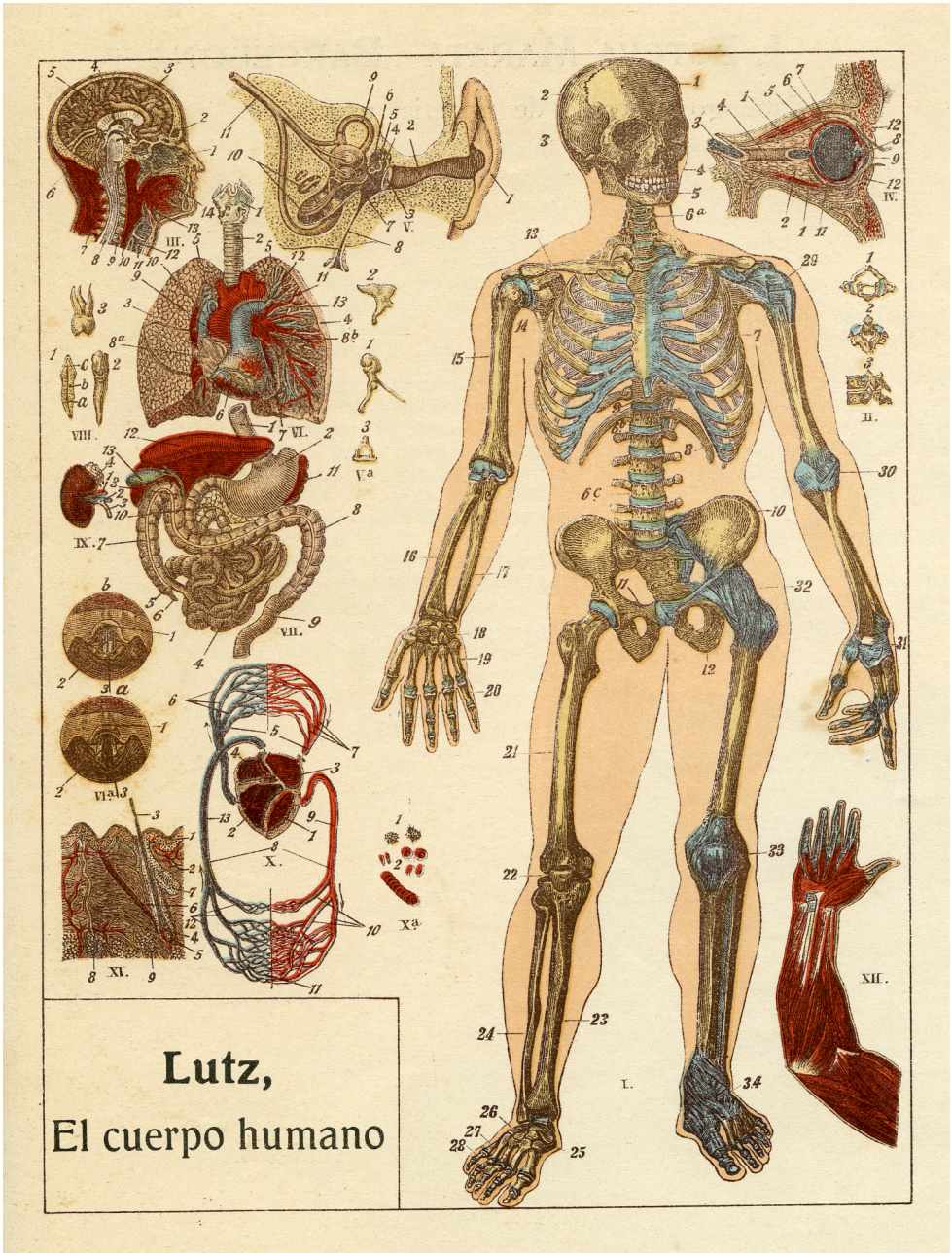
[49] Volckmar, *Catálogo General*, cit., pp. 203-207.

[50] *Ibid*., p. 253.

[51] Ruiz Berrio *et alii*, *La editorial Calleja, un agente de modernización educativa en la Restauración*, cit., p. 180.

[52] F.J. Frutos, C. López, B. González, M. Carmona, *La linterna de proyección y la enseñanza de las ciencias: el papel de las placas diascópicas en las aulas de bachillerato en España durante el primer tercio del siglo XX*, in L. López-Ocón, V. Guijarro, M. Pedrazuela (edd.), *Aulas Abiertas. Profesores viajeros y renovación de la enseñanza secundaria en los países ibéricos (1900-1936)*, Madrid, Universidad Carlos III, 2018, pp. 219-252.

[53] <http://ceimes.cchs.csic.es/node/8353> (last access: 13.10.2019).



Pic. 3. Human anatomy wall chart by G. Lutz (Bazar Ibérico, *Catálogo general*, cit., p. 273)

Cardenal Cisneros preserves an almost complete series on biogeography, representing landscapes with the characteristic fauna and flora of each region represented [Pic. 4]. Another very famous series present in our classrooms was that of Jung, Von Koch and Quentell, which represented drawings on a black background, so achieving greater corporeality and effects at greater distances, and it was acquired by many institutes [Pic. 5]. For example, during the academic year 1923-1924, the Instituto de San Isidro in Madrid acquired 11 botany charts by Jung, Von Koch and Quentell, 11 by Täuber and 8 from Hartiger's forest collection, according to the memoirs[54].

Despite the usefulness and value of this material, variuos authors warned about the problems they might cause, since the charts were associated with expository teaching and rote learning. Ricardo Rubio argued that: «school collections of prints, made as they were for industrial purposes and to make them as affordable as possible, are not to be recommended, some because of their size, others because of their colouring, and still others because of the false relationship between the objects represented»[55]. He also criticised their lack of pedagogical criteria in the choice of the specimens represented on the charts, since these should be different according to the geographical location of the centre where they were to be used. The innovative processes of active teaching were compatible with the use of the illustrations as complementary or support material, but never as the sole teaching resource.

Ricardo Rubio did recommend two specific collections of the Pedagogical Museum: the Dodel-Port charts that showed the systematics, physiology, histology and cytology of plants, inclued in our sample in the Volckmar catalogue in 1910[56], and a collection of 70 Natural History charts from Émile Deyrolle, which we have not found in any of the catalogues.

The charts were given a new boost by the Austrian teacher Paul Pfurtscheller, and [Pic. 6] they figured in the Casa Cultura catalogues in 1932 and in the Magisterio Español in 1930, as mentioned by Celso Arévalo, one of the renovators and introducers of experimental work in the classroom:

> Since the beginning of my academic life I have been using the wall charts of Professor Pfurtscheller from Vienna to help my students get an idea of the organization of the main zoological groups […] these wall charts are indeed highly in instructive and represent the disections of well-chosen types[57].

[54] Instituto de San Isidro de Madrid, *Resumen acerca de su estado en el curso de 1923 a 1924*, Toledo, Talleres Gráficos de Rafael Gómez Menor, 1925, p. 11.

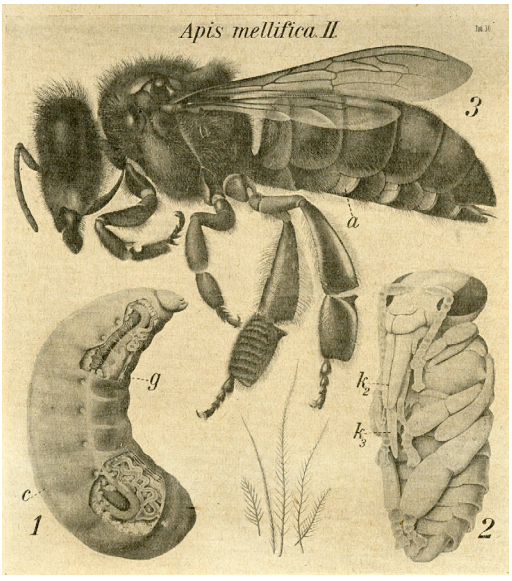
[55] Rubio, *La Botánica y su enseñanza*, cit., p. 202.

[56] Volckmar, *Catálogo General*, cit., p. 225.

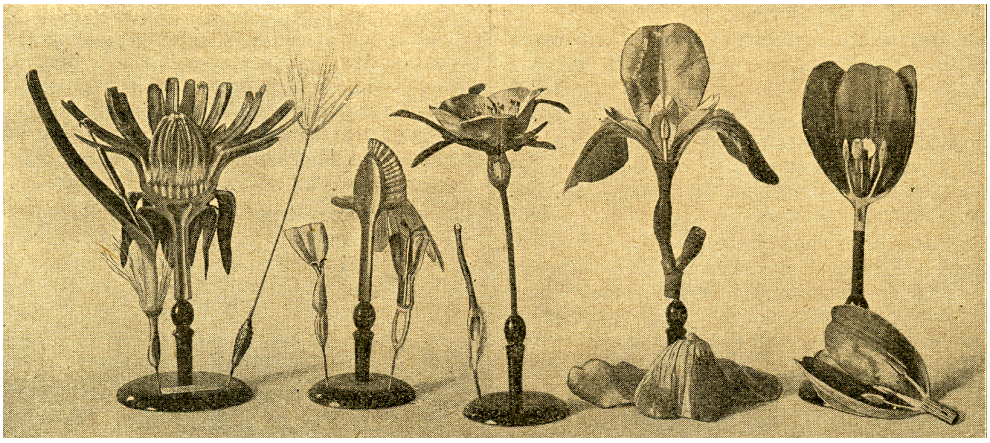
[57] C. Arévalo, *Prólogo*, in SOGERESA, *Notas zootómicas adaptadas a las explicaciones de las láminas murales de zoología del Prof. Dr. Paul Pfurtscheller de Viena*, Madrid, Editorial Sogeresa, 1922, p. 3.

Pic. 4. World biological geography chart by Täuber
(Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 37)

Pic. 5. Horsetail fern anatomy chart by de Jung, Koch & Quentell (Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 109)



Pic. 6. Bee wall chart from the series by Paul Pfurtscheller (Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 96)



Pic. 7. Models of flowers and inflorescences by Osterloh
(Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 106)

The first anatomical models used in Spanish secondary schools were Dr. Auzoux's anatomical models, papier-mâché reproductions with which it was possible, in many cases, to make dismountable or clastic models. Professor Manuel María José de Galdo, teacher of Natural History at the Instituto Cardenal Cisneros in Madrid, was commissioned by the Madrid City Council to buy the clastic man and other animal models for his school and for the Instituto de San Isidro directly from the Parisian shop in Auzoux[58]. Among other models present in Spanish classrooms, we highlight those of R. Brendel in Berlin, who made a large series in gelatine, papier-mâché and wood, Les Fils d'Émile Deyrolle in Paris and the models of Osterloh in Leipzig that would appear in the catalogues of Koehler & Vohlckmar [Pic. 7]. As for models made in Spain, we have those of Areny de Plandolit[59] and the 44 plant and 26 animal modles offered by Cultura [Pic. 8].

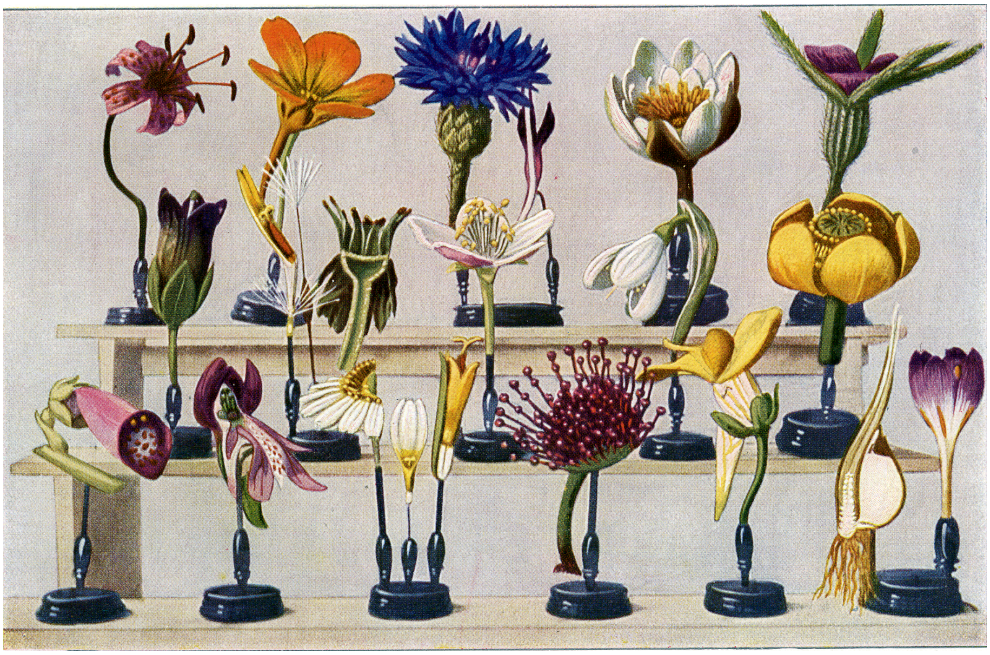
For the study of the mineralogy we found crystallographic models constructed of enameled wire, representing the diverse forms and types with their axes of symmetry. Some were of wood like those of the Dr Krantz and represented simple and twin forms[60].

Like the charts, not all models contributed to active teaching. The use of the model was to illustrate the natural object in order to clarify doubts. It was also

[58] Aragón, *Historias de objetos que cuentan historias: plantas, rocas y animales en los institutos históricos madrileños*, cit., pp. 105-116; A. Gomis, D. Ruiz-Berdún, *Los modelos clásticos del Dr. Auzoux, del aula al museo*, «Boletín de la Real Sociedad Española de Historia Natural, Sección Aula, Museos y Colecciones», vol. 3, 2016, pp. 39-52.

[59] Areny de Plandolit, *Catálogo ilustrado de modelos de anatomía*, cit.

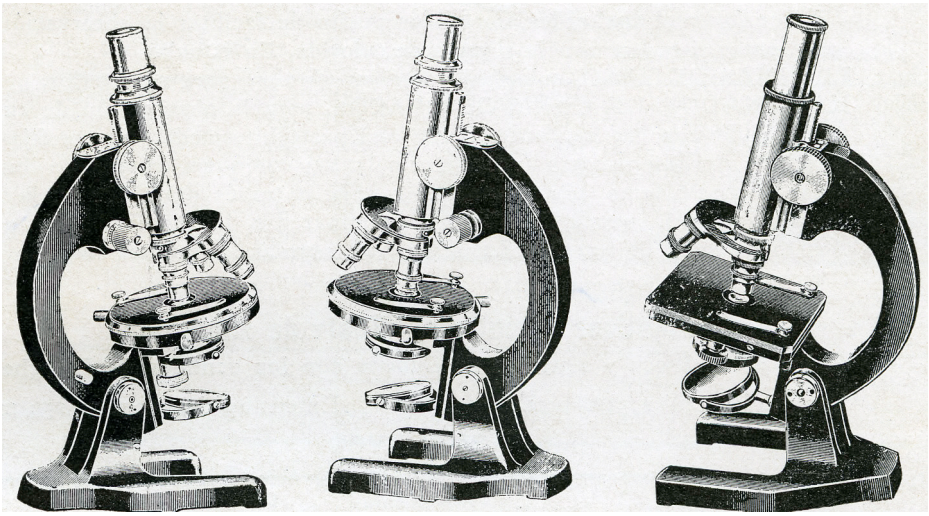
[60] Cultura, *Catálogo 30*, cit., pp. 151-152.



Pic. 8. Models of flowers and inflorescences from Casa Cultura
(Cultura, *Catálogo de material pedagógico moderno*. Tomo II, cit., p. 17)

a resource when there was insufficient material or no means to conserve copies. Through the detailed memoirs of the secondary schools, we can see how the symbolic representative material became more and more important. Between 1910 and 1911 the incorporation of the models of the house Les Fils d'Émile Deyrolle, in several Spanish institutes is documented. The Valencia Secondary School received a series of models from the Deyrolle house, and these were added to an existing collection of fruits and 49 reproductions of mushrooms from the house of H. Arnoldi, which was set up in the times of Professor Emilio Ribera y Gómez, a renovator in the teaching of natural sciences who turned the Valencian science office into one of the best in the country[61]. In the debate on whether or not to use these materials we see the positive position of Professor Luis Pardo, a disciple of Celso Arévalo and curator of the legacy of Emilio Ribera: «given the high number of students, it would be unproductive to use

61 S. Aragón, *Los premios Ribera: el mecenazgo privado en los tiempos de la institucionalización de la actividad científica en España*, in L. López-Ocón (ed.), *Aulas modernas. Nuevas perspectivas sobre las reformas de la enseñanza secundaria en la época de la JAE (1907-1939)*, Madrid, Dykinson, 2014, pp. 48-50.



Pic. 9. Monoculuar microscopes from Rosenbaum
(Cultura, *Catálogo 30*, cit., p. 125)

natural specimens during the explanations; for this reason clastic pieces have been used»[62].

3.3 *Microscopy and laboratory materials*

The commercial reference in the world of microscopy was the Central European houses, especially the German ones. The most important manufacturers of optical instruments were Leitz in Wetzlar, Zeiss in Jena, Engelbert and Hensoldt in Wetzlar, Himmler in Berlin, Rosenbaum in Berlin and Reichert in Vienna, among others. In Spain the catalogues devoted special attention to the products of Leitz, Zeiss and Rosenbaum [Pic. 9]. In the area of microscopic slides, the commercial companies offered a great variety. In 1927, the Cultura offered 47 collections of microscope slides and in 1934, 384.

The evolution of lenses and microscopes mirrored the studies using physics and chemistry apparatus[63], and they began to be used as teaching tools for analyses and experiments. In the academic year 124-1925 the Institute of

62 L. Pardo, *El herbario y colecciones de botánica del Museo de Historia Natural del Instituto*, «Anales del Instituto Nacional de Segunda Enseñanza de Valencia», n. 14, 1926, pp. 1-179.

63 V. Guijarro, *Artefactos y acción educativa. La cultura del objeto científico en la enseñanza secundaria en España (1845-1930)*, Madrid, Dykinson-Universidad Carlos III, 2018.

Murcia, for example, acquired several microscopes, some of which were designed for excursion use, four (pocket) *Taschen Mikroskope*, better known by the acronym TAMI[64], from Hendsolt de Wetzlar, and five sets of microscope preparations[65]. It was said of the TAMI that «it was the 'naturalists' choice for rapid observations and its small size made it the perfect companion on excursions»[66].

3.4 *Experimentation furniture and installations*

The teaching and experimental practice of science required increasingly varied and numerous facilities and furniture, for which specialized houses had to be used. The Société des Éditions Louis Michaud attached great importance to laboratory furniture, offering its customers the services of the best European specialists, Flicoteaux and Poulenc in France, Ernecke and Max Kohl in Germany – brands with proven experience. The equipment advertised included tables prepared for experimentation, glass hoods with air extraction, drains or washing facilities and sterilisation equipment. For the tables they recommended enamelled volcanic lava panels, a very hard, durable material that is resistant to acids and bases. The laboratory benches were equipped with water and gas pipes, taps for both, their coating was lava and they sat up to six people. The installation included bronze laboratory lamps and gas or electric lighting[67]. About a decade later we find the modern steel laboratory tables supplied by the Vellvé Company, with two layers of special acid-resistant enamel and the covering board made of wood or artificial stone[68].

3.5 *Proyection and diascopic slides*

Although instruments, we consider them associated to the representative material, since they were used to project the glass slides or diascopic slides, as well as opaque bodies. Through the study of the catalogues of different houses it is possible to appreciate the evolution of these instruments, from the magic

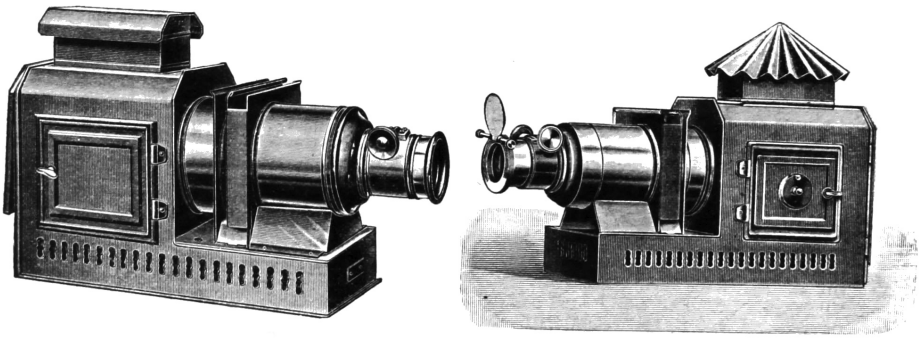
64 Instituto Nacional de Segunda Enseñanza de Murcia, *Memoria anual correspondiente al curso académico de 1924 a 1925*, Murcia, Imprenta Sucesores de Nogués, 1925, p. 48.

65 Instituto Nacional de Segunda Enseñanza de Murcia, *Memoria anual correspondiente al curso académico de 1925 a 1926*, Murcia, Imprenta Sucesores de Nogués, 1926, p. 50.

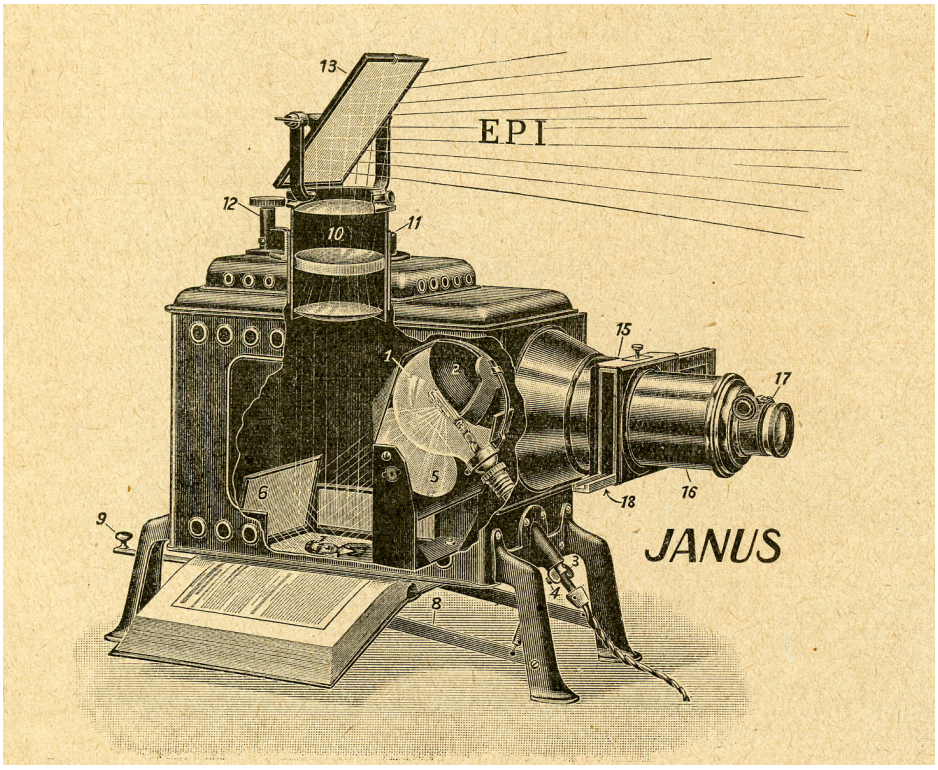
66 Dalmáu, *Catálogo del material escolar número 37*, cit., p. 112.

67 Louis-Michaud, *Catálogo ilustrado de material de educación moderna e integral*, cit., pp. 420-424.

68 Vellvé, *Catálogo de material escolar*, cit., p. 51.

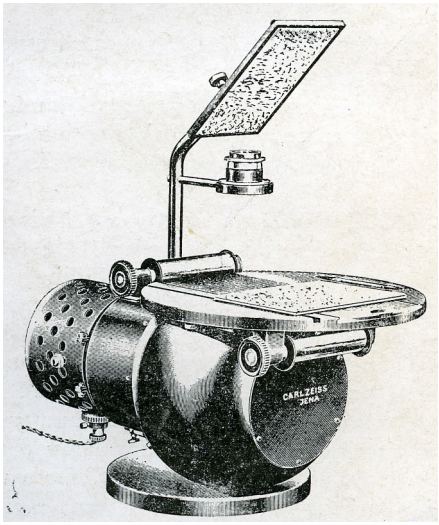


Pic. 10. Oil magic lanterns
(Volckmar, *Catálogo General*, cit., p. 308)



Pic. 11. Janus Epidiascope
(Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 125)

lanterns or sciopticons [Pic. 10] with petroleum lamp offered by L. Volckmar in 1910 to the modern models of Zeiss, Artibus and Benzinger electrical to the epidiascopes of the *Janus* models [Pic. 11] or the *Janulus* or *ICA*. In addition to the range of projection equipment, Koehler & Volckmar took into account the suitability of the electrical system, and requested special estimates for switchboards, transformers and rectifiers. It was also necessary to indicate the currents available[69].



Pic. 12. Carl Zeiss Belsazar Projector (Cultura, *Catálogo 30*, cit., p. 17)

In 1934, Cultura mentioned various devices like opaque body projectors, such as the *Adoro* or *Famulus* episcopes from Zeiss-Ikon, opaque body and slide projectors including the *Cylor*, *Diabox* and *Belsazar* models from Zeiss [Pic. 12] which projected at the same time as one wrote[70]. The large number of these diascopic slides offered is consistent with other studies that seem to confirm their leading role in certain high school classrooms in Spain during the first decades of the 20th century[71]. In projection, special mention is due to the cinema and instructive films such as Pathé's «documentary» films on different animals, geological phenomena like the Etna eruption as well as places of geological interest[72].

Conclusions

The study of commercial catalogues of teaching materials reveals see some of the multiple possibilities they afford historical research into various dimensions of the material culture of academic institutions, the production and distribution of equipment and teaching resources for educational practices. The catalogues are a clear example of the wide development experienced by the educational

69 Koehler & Volckmar, *Catálogo General Ilustrado de Material Pedagógico Moderno*, cit., p. 124.

70 Cultura, *Catálogo 30*, cit., p. 18.

71 F.J. Frutos, C. López, B. González de Garay, N. Carmona, *La proyección de imágenes en las aulas de bachillerato en España durante el primer tercio del siglo XX*, «Fonseca. Journal of Communication», n. 16, 2018, pp. 31-45.

72 Dalmáu, *Catálogo de material escolar número 37*, cit., pp. 132-133.

industries throughout the period under consideration, as well as evidence of the complex relationships existing in the national and international marketing networks of their products, and of the media of mass education. Their pages showcase the evolution of the supply of school materials in general and of scientific and educational materials in particular, in this case, for the teaching of the natural sciences. But in order to determine such relevant aspects as the effective reception over time of the diversity of materials offered in secondary education centers in Spain, the evolution of pedagogical concepts and teacher attitudes, not always unanimous towards them, their relations with the processes of teaching innovation, and the uses of such materials in educational practices, we have drawn on sources like inventories of teaching centers, institutional memories or teacher testimonies.

In the catalogues analyzed, we have been able to observe trends and substitutions, how the offer of materials shows the transition from the study of nature based on observation and demonstration to one based on experimentation, the transition from the cabinet-museum to the modern laboratory. Thus, the representative or passive materials, such as dissected or preserved animals, cease to be reference accessories in educational practices, while Natural History classrooms tended to incorporate experimental material, such as modern Zeiss microscopes and adapted furniture. Projection apparatuses appear, initially for visual demonstrations, and with the advance of technology for teaching in general, incorporating a wide range of slides where natural beings could be observed in their habitat, first as drawings and later as photographs.

The wall charts were also replaced by projectors. In many cases diascopic slides replaced the wall charts because, despite their fragility, they were easier to transport and store, as well as cheaper. This replacement was gradual and with some resistance from some teachers like Celso Arévalo who continued to defend the use of good wall charts, like those of Paul Pfurtscheller, as the best and cheapest means that the teacher had to enlighten the class. He claimed that in general there were no comfortable means of projecting drawings in our lectures, which also had the added trouble of working in the dark[73]. Within the projection devices there was swift progress from the magic lanterns to the most advanced epidiascopes and projectors.

As for the traditional representative material, we observe the continued offers of the commercial houses like the wall charts, pictures and models, which were often the same collections or a selection of the most interesting ones. In Spanish secondary schools there tended to be a certain coexistence of classical material for teaching Natural History with modern experimental material.

[73] Arévalo, *Prólogo*, cit., p. 3.

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Illustrated gallery of animals: figurative ABCs and the literacy process (France and Brazil, 19th and 20th centuries)

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ABSTRACT: The article analyzes a set of illustrated ABCs printed in France and Brazil, in the 19th and 20th centuries, focused on teaching reading and writing, whose central theme is the «animal kingdom», part of natural history, a theme that is characterized by its variety and didactic versatility in the literacy process. The investigation examines how the association between letters, words, and illustrations of animals is produced. By comparing them, we have found recurrences, specificities, and, above all, a possible common adoption of models and images. Indications of transnational circulation between Brazil-France can be seen by the publishers; the recurrence of the «animal kingdom» in very similar illustrations; the indication of the printing locations; and the presentation notes that justify the translations, adaptations, and reprints to meet the specificities of the different contexts.

EET/TEE KEYWORDS: History of education; Illustrated ABCs; France; Brazil; XIXth and XXth Centuries.

1. *Triggering questions*

> There is no unambiguous meaning for the things of the past […]. One can make the archive say everything, everything and the opposite; one of the first requirements is to clarify the inquiry procedures[1].

Our interest in ABCs, as a historian and pedagogue, willing to think together about themes we consider little explored in the fields of history of literacy and history of written culture, came from an attention to the material culture of the school, especially to prints, to teaching materials, and their uses in practices concerning the acquisition of written language, or, more particularly, the teaching of writing and reading[2]. The place of the alphabet book, as a pedagogical device of the modern school, and its complex relationship with different literacy pedagogies, has been the object of attention in several publications. However, the immersion in studies from different spheres – history of written culture, history of education, history of educational prints, history of literacy – led us to note the little attention given to ABCs, although education historians recognize their secular presence in modern school. Were they naturalized to a point in which there was no questioning regarding their historical presence in school education and social practices? Was everything said? And the opposite? We inquire about the emergence, circulation, and appropriation of the ABC as a cultural artifact to acquire the alphabetical writing system in different sociocultural contexts, its different meanings, formats, and contents, in short, the continuities and mutations in its historicity. We ask what can explain the persistence of its use today, but also what its production and its resistance in time meant, being collected, filed, transformed into archival pieces, inserted in «documentary deposits» to be «explored as sources» by historians[3]. Aiming to break and overcome a «fetishization of historical material»[4] represented by the ABCs, we intended to denaturalize them and to ask about their conservation and archiving, their production, the transnational and transcultural circulation of their forms, images, strategies of composition, as well as their uses and operating logics.

We adopted the expression ABC from the meaning formulated based on the reflections of Cagliari and Faraco[5] on the history of writing. The ABC

1 A. Farge, *O sabor do arquivo*, São Paulo, EDUSP, 2009, pp. 92-94.

2 Research support: CNPq; CAPES.

3 J. Morsel, *Du texte aux archives: le problème de la source*, «Bulletin du Centre d'Études Médiévales d'Auxerre», Hors-série n. 2, 2008.

4 *Ibid*.

5 C.A. Faraco, *Linguagem escrita e alfabetização*, São Paulo, Contexto, 2012; L.C. Cagliari, *A história do alfabeto*, São Paulo, Paulistana, 2009.

is an invention that unfolds from the notion of alphabet. For Le Men[6], the ABC presents the letters according to the alphabetical order, under a certain support, used since the alphabetical writing exists. As Victor Hugo writes, «all words were first signs, and all signs were first images»[7]. Here, the alphabet is conceived as a set of spelled characters that make up a writing system and that adopts as a reference the relationship between grapheme/phoneme. An ABC is, therefore, a cultural and historical artifact, presented as a collection of letters inserted in a support, generally printed, although not exclusively, whose objective is to proceed with the didacticization of each and all letters of the alphabet, aiming to teach and learn reading and writing. It is important to understand that ABC and alphabet are not synonymous, not coincident in the history of written culture, although viscerally related, since they have several imbrications, among which stand out those of implication, complementarity, joint uses, and similar roles.

Alphabets have a long history. Some authors even claim that their origins are so remote that it seems impossible to assign an inventor to them[8]. Their presence is witnessed since the Mesopotamian tablets in the form of stone engravings[9]. They represent, for centuries, a pedagogical tool for those who cannot read. It is in the 19th century, with the rise of literacy and the extension of schooling, when children begin to be educated in school, that the ABCs become established, in a relationship between school and help in the family. They become varied, not limited to books, appear on walls as posters, on tablets, or simply painted on the classroom walls, in the form of educational games. They become widespread and progressively illustrated, differing in terms of form, visuality, associated content, and also regarding the concepts of initiation to writing and reading of their editors. As prints, they come in different sizes, types, with mnemonic or educational intentions.

Le Men (2015) emphasizes that the process of learning how to read, in which ABCs are included, as a simple technical performance, «functions as a rite of passage»[10]. For Litaudon-Bonnardot (2014), the ABCs were able to represent the first books, the first images, the first letters, objects of fascination for children.

Whichever means images use to entertain a child and introduce them to literature; this take place at the center of an initiation from which they'll come back transformed. Learning

6 S. Le Men, *Des images, au seuil des lettres*, in J. Duvallon, *ABC Abécédaires*, Paris, Éditions de La Martinière, 2015, pp. 6-7.

7 V. Hugo, *Œuvres complètes de Victor Hugo en voyage*, Paris, Librairie Ollendorff, 1910, Vol. II, p. 215.

8 J.-M. Embs, P. Mellot, *Le siècle d'or du livre d'enfants et de jeunesse. 1840-1940*, Paris, Éditions de l'Amateur, 2001, pp. 25-39.

9 Le Men, *Des images, au seuil des lettres*, cit., p. 6.

10 *Ibid*.

how to read symbolizes our passage to the intuitive stage and stablishes the cornerstone of a logocentric construct that indicates the child's entrance in men's society[11].

Considering and understanding this process expands the importance of ABCs, which played an essential role in the literacy of the 19th and 20th centuries, as well as multiplies the possibilities of investigation about their modalities and uses. It is worth mentioning that the ABCs are not intended only for children, but correspond to different circuits and audiences, although they have gradually focused on them, since they have become objects idealized by editors specializing in the educational genre as literature for children.

Before materials that are not very inviting to children, such as some rare school manuals from the early 19th century, with rudimentary printing and without illustrations, the ABCs give increasing space to the images and start to be recognized as printed materials that encourage, amuse, and capture children's attention for the difficult learning process, especially of reading, and later writing. We can state, in this sense, from what Nières-Chevrel (2014) says, that, over time, a shift from an educational literature to a recreational literature occurs[12].

Szir (2007) emphasizes that one must consider the state's concern regarding the expansion and consolidation of the educational system at the end of the 19th century. According to the author, this movement, which results in a growing number of potential readers, created a space for investment by the editorial market in prints aimed at children, which means that «la amalgama entre lectura instructiva y recreación está presente en los objetivos que se hacen explícitos en todas las publicaciones periódicas para la infancia y la juventud en el siglo XIX»[13]. Szir (2007) adds that printed materials took the responsibility of teaching by entertaining and that pictures became the main source of attraction in children's publications.

Other authors endorse the teaching nature and recreational aspect of printed materials for children. In the words of Embs and Mellot (2001), «the ABCs is, without a doubt, the most crucial childhood book, the simplest in appearance, but the hardest to conceive»[14]. For these authors, the ABC is located in a type of junction between two mental universes: an old one, based on perceptions and dominated by the senses, which children must overcome; and a new one, in which they will enter, which proposes a new, more abstract dimension. The juxtaposition of letter and image, in this sense, according to the authors, is the meeting point of these two mental universes, which do not always correspond

[11] M.P. Litaudon-Bonnardot, *Les abécédaires de l'enfance. Verbe et image*, Rennes, Presse Universitaires de Rennes, IMEC, 2014, p. 13.

[12] I. Nières-Chevrel, *Préface*, in Litaudon-Bonnardot, *Les abécédaires de l'enfance*, cit., p. 11.

[13] S. Szir, *Infancia y cultura visual: Los periódicos ilustrados para niños* (1880-1910), Buenos Aires, Miño y Dávila Editores, 2007, p. 21.

[14] Embs, Mellot, *Le siècle d'or du livre d'enfants et de jeunesse*, cit., p. 25.

to the same logic, but characterize most of the illustrated ABCs[15], hence the expression «figurative ABCs» that we adopted. The images of the ABCs fulfill the mission of making knowledge attractive, making the learning process of reading fun[16].

The observation by Embs and Mellot (2001) about the letter/word and image juxtaposition that characterizes the nature of the figurative ABCs of the period examined suggests a crucial problematization: How is it possible to learn the abstraction of the letter A, alternating its use with the names of birds, quadrupeds, flowers, travels, objects? If abstraction is necessary to fix the alphabetical order that determines the logic of the ABC structuring, according to these authors, the child, in many cases, is faced with an unordered sequence of representations (pictures, illustrations) and heteroclitic texts (moral lessons, natural history information, practical content, religious precepts, poems, descriptions, fantastic little stories related to letters and their words), sometimes featuring a thematic alphabet, other times merging without coherence in the same print. These contents and images, once read from the first to the last page, may seem to the child a story at least absurd. According to Embs and Mellot,

> If it is true that the spirit makes alphabetic abstractions that, alone, determine a book's logic and comprehension, it grasps a sequence of unorganized representations and heteroclite texts that, read nonstop, from start to finish, will make no sense. But is through this garden that children walk, searching for the key to adult reasoning[17].

We can add that the thematic compositions, some more coherent and comprehensible, others very peculiar and heterogeneous, that characterize several ABCs, are the expression of a way of proceeding from the thinking of diverse agents, such as authors, illustrators, pedagogues, editors, and booksellers, who produce different editorial arrangements, according to often arbitrary criteria and unusual combinations.

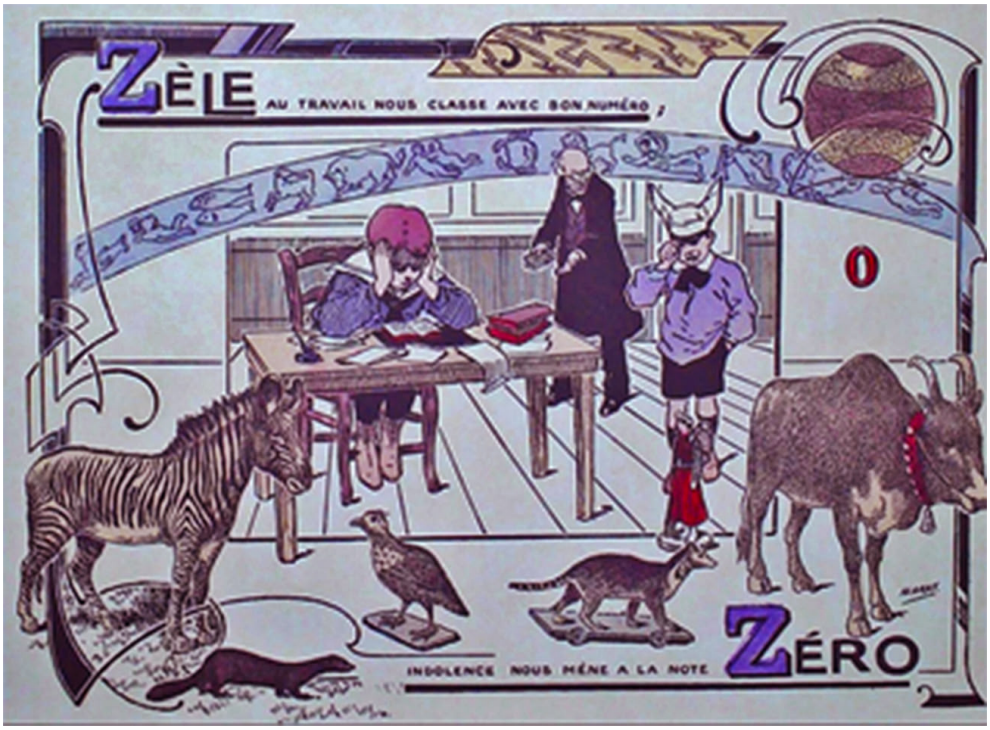
Duvallon presents the ABC *Alphabet des bons conseils et des fautes à eviter*, published around 1919, as a good example in the illustrations that accompany letter Z, which, in the proposed thematic order – advice and faults to avoid – would correspond to the «Zèle au travail nous classe avec bon numéro. Indolence nous mène a la note Zéro»[18]. We can see how composite figures,

15 *Ibid*., p. 26.

16 Le Men, *Des images, au seuil des lettres*, cit., p. 7.

17 *Ibid*., p. 25.

18 [Work zeal gives us good grades. Laziness gets Zero]. *ABC Alphabet des bons conseils et des fautes à eviter*, Paris, Charles Ramel & Cie Éditeur, vers 1919, in J. Duvallon, *ABC Abécédaires*, Paris, Éditions de La Martinière, 2015, p. 21.



Pic. 1. *ABC. Alphabet des bons conseils et de fautes à éviter* (around 1919)
Source: J. Duvallon, *ABC Abécédaires*, cit., p. 21.

difficult for the child to understand, express adult and arbitrary logic at play on the illustrated page, from good attitudes, school discipline, the gallery of the zodiac signs, some animals (in reference to the zoo?), passing through the metaphorical use of donkey ears that serve as punishment for the student's faults, as well as representations of animals whose name we are not sure can be related to the letter Z, perhaps zebra, the most recurrent animal in all examined ABCs, zebu and others that seem to appear only as an adornment in a type of small natural history museum in the classroom [Pic. n. 1].

The inquiring, discursive, and pedagogical strength of illustrated ABCs is still on our horizon as an enigma that is difficult to decipher. In the particular case of the animal gallery as the main theme of ABCs printed in French or Portuguese, we think one must cast different looks that allows us to outline a deeper analysis, even if provisional, in the field of growing research on the history of books and, particularly, didactic editions.

2. *«What one sees spreads to what one reads. What one sees transforms what one reads»*[19]

Inspired by Arnaldo Antunes, we consider letters associated both with words and images as a hybrid territory between verbal and visual codes. The vision turns to letters and images, or we can even think that letters and images are both illustrations in the visual field of beginners. Their acquisition supposes distinguishing, progressively, that if the letters are, in fact, carefully drawn traces, they do not belong to the same order as the figurative images associated with them. The letters-drawings add up, they need to be learned by heart to read them, but also to write them, and handwriting is, then, a new field of experimentation, of the mind, the eyes, the body. «The layers of experimentation are multiplied»[20].

The knowledge acquired from the ABCs is not purely linguistic. The mysteries of the graphic signs arranged in these prints, carefully illustrated, lead us to learn about rhythms; movements; conjunction of colors and sound frequencies of reading; representations of the world, culture, childhood. In short, we learn to formulate scenarios of the imagination, desires of consumption, fascination with words, images, and written guidelines.

The provocations of the different authors mentioned above led us to the interest in examining a set of printed materials that we gathered and designated as figurative and illustrated ABCs. As objects of appreciation, the collected titles do not represent, nor do they propose to encompass, all the prints of this type that were produced in the period examined – 19th to 20th centuries – in France and Brazil.

Objects written in the form of manuscripts, paintings, prints, and epigraphs, along with the resulting reading practices, can be called, according to Petrucci, as graphic culture[21]. Readers, as we stated before, when handling a text conveyed in different media, and because of these, assign different meanings to what is read, which leads us to consider the relevance of the editorial and textual devices that make up the ABCs examined here. Thus, we reiterate the importance of the support, especially of the images they bear, considering that the changes in the graphic configuration of the pages and in the reading protocols produce different attributions of meaning to what is read. After all, «what one sees spreads to what one learns».

Most of the ABCs in the late 18th century, in France, as well as in Brazil, did not have images, except, at times, for an illustration in their frontispiece. They

[19] A. Antunes, *Sobre a caligrafia*. Last updated: 20.03.2002, <http://www.arnaldoantunes.com.br/new/sec_textos_list.php?page=1&id=73> (last access: 07.04.2020).

[20] *Ibid*.

[21] A. Petrucci, *Alfabetismo, escritura, sociedade*, Barcelona, Gedisa Editorial, 1999.

consisted of a collection of letters and syllables, sometimes added with a few words, intended for reading aloud or spelling[22].

However, since the middle of the 19th century, according to some authors from 1860 onwards, the ABCs or illustrated alphabets started to present the association of each letter of the alphabet with a word or words, or even with an evocative sentence, both related to a printed image in its topographic proximity. The use of images in ABCs has become systematic from the 20th century onwards, and these prints prosper and have their presence expanded in teaching[23]. But let us not be confused. Nières-Chevrel (2014), presenting the study by Litaudon-Bonnardot, states that this author shows that the massive entry of illustrations, especially those in color, in these prints, produced a mutation of the genre without the tradition completely fading. The alphabetical order was maintained, as well as its fundamental learning objectives and its link to the school institution and to the initiation in the world of letters[24].

Initially, several illustrated ABCs are associated with religious themes, such as the qualities or good deeds that should characterize the edifying examples to be followed by the little beginners[25], alphabets of saints and virtues. Subsequently, they adopt other themes, such as civility (good manners; good examples; bad attitudes and faults to avoid, etc.); military (maritime, nations and their flags, uniforms, types of soldiers, etc.); skills (arts and crafts, professions, etc.); toys and games, children's games[26]; fables; as well as ABCs associated with natural history. The preference for themes related to natural history predominated in the school uses of the ABCs, and they appear as alphabet of birds; alphabet of flowers, butterflies, and insects; and alphabet of animals, broadly named. The latter were the ones we chose for a closer look. As we stressed initially, we gathered printed ABCs that circulated in France and Brazil, which associate letters and words with images of animals, even when their titles do not make any specific reference to the animal kingdom.

We proceeded to contrast these ABCs, which, in addition to the place of printing and circulation, also vary in terms of the chronology of their edition. We tried to observe recurrences, coincidences, specificities and, above all, whether it is possible to say there was a transnational and transcultural circulation of printed models, illustrations, didactic principles and, perhaps, their literacy methods. We understand, inspired by Cooper-Richert (2013), that a look at the ABCs from the perspective of cultural transfers, examined under the transnational concept, leads us to inquire about the displacements or cultural journeys, here considered in a broad sense, as movements of double direction and double meaning, with reciprocal influences by the editorial work

22 Embs, Mellot, *Le siècle d'or du livre d'enfants et de jeunesse*, cit., p. 27.
23 Nières-Chevrel, *Préface*, cit., p. 10.
24 *Ibid*.
25 *Alphabet du petit Jésus*, Paris, Typographie Morris Père et Fils, 1877.
26 Litaudon-Bonnardot, *Les abécédaires de l'enfance*, cit., p. 342. Also the print entitled *Tableaux alphabétiques des jeux de l'enfance ornés de gravures*, Paris, Gauthier Éditeur, 1765 (BNF-X-19675).

by the formation of a print and reader market, especially in the middle of the 19th century and the first decades of the 20th century. According to the author:

> History of cultural changes, travel of ideas and practices, circulation of concepts and theories, through official or virtual frontiers that separate countries, or cultural areas, is yet to be written, despite researches enthusiasm for this new historiographical approach. It is important to remember that cultural areas are not closed fields, or untouched entities, but, on the contrary, places of hybridization in which national identities are constructed. These result from various exterior influences, multiple imbrications, and constant and rich exchanges[27].

In turn, the movement of contrasting the gathered ABCs is inspired by the explanation proposed by Stephanou and Monteiro (2012) regarding calligraphy, when analyzing ideas about this school exercise in two authors, from different times and places, also in France and Brazil. The authors explain the analytical-methodological movement they apply in the study:

> Contrasting is comparing, putting (distinct elements) in contrast, verifying or highlighting the differences. This suggests the approximation of contrasting and collating, or even being or making something be in contrast (more than one thing), in a relationship of different aspects so that this difference mutually accentuates the aspect of each thing. Contrasting as collating consists of investigating, analyzing (something), putting it in contrast to another[28].

Litaudon-Bonnardot (2014) confronts the ABCs of a physical collection with more than 1200 Francophone and Anglophone prints that her research brought together, covering the 19th and 20th centuries[29], a study that pointed out to us not only research directions, but the pertinence of the purposes we outline here. Thus, we contrasted ABCs published in France and Brazil, a procedure that allows us to «observe, alongside similarities, important cultural differences»[30]. For Nières-Chevrel (2014), the confrontation carried out by Litaudon-Bonnardot makes it possible to examine how the political, social, and even religious history of each country appears in these prints that, after all, ritualize the child's entry into the universe of the written culture. This procedure, moreover, allows Litaudon-Bonnardot to state that, in the case of English-speaking and French-speaking ABCs, contrary to what linguistic differences would lead one to think, an expressive number of ABCs have been adapted from one language to another, especially regarding their images. Researchers must know the prints well so that they can recognize the adaptations and recreations[31].

[27] D. Cooper-Richet, *La figure du passeur dans l'histoire de la diffusion transnationale de la théorie des Cultural Studies (années 1990)*, «História», vol. 32, n. 1, jan./jun. 2013, p. 190.

[28] M. Stephanou, C. Monteiro, *Contrastando indícios: cenas de escrita na escola*, in «18° Encontro da ASPHE», vol. 1, Porto Alegre, PUCRS, 2012, pp. 1-15.

[29] Litaudon-Bonnardot, *Les abécédaires de l'enfance*, cit.

[30] Nières-Chevrel, *Préface*, cit., p. 10.

[31] *Ibid*.

A description of the ABCs examined here highlights the typographic and textual devices adopted by editors and/or authors, in particular the choice of animal pictures whose engravings operate as devices for teaching the memorization of the alphabet letters in relation to their respective sounds. In addition, the contrasting of the ABCs we gathered here, from France and Brazil, leads us to ask how some were adapted from one language/context to another and whether what prevailed was the circulation of their texts or, above all, of their themes and images.

3. *Animal gallery in alphabets: showcases of pictures, words, syllables, and texts*

In the history of the printed ABC we can identify, either by the advent of new reproduction techniques or by the new graphic resources, such as woodcut and lithography, the insertion of images, which start to integrate more elaborate and ornate editions with more vivid colors. As we explained earlier, such prints are widespread and increasingly required by the rise of literacy and schooling in the mid-19th century and throughout the 20th century.

Litaudon-Bonnardot states that, from 1830-1840, the images started to circulate on an international scale, but that, at the end of the 17th century, black and white pictures, later colored, were already included in the ABCs in England, and later, in the last third of the 19th century, also in France, when French publishers associate with English publishers. For the author, «the internationalization of exchanges in the field of illustrated ABCs leads to tricky translation problems»[32], which were of two types: linguistic, linked to alphabetical requirements; and cultural, which stem from differences between national traditions[33].

The contrast of the ABCs, in this article, does not reach all aspects involved in the processes of transcultural and transnational circulation, but focuses on the visual and linguistic aspects, on the solutions adopted to meet the idiomatic requirements of the alphabetical order – initial letter, alphabet sequence, maintenance of the same thematic axis (animal kingdom) –, as well as the recurrence or not of identical or very similar images in the different printed materials.

The illustrated and figurative ABCs that we gathered are characterized as ABCs that have, expressively or for some letters, images of animals among the printed illustrations, and they are listed in the table below. Note that the titles do not necessarily refer to the animal theme.

[32] Litaudon-Bonnardot, *Les abécédaires de l'enfance. Verbe et image*, cit., p. 200.
[33] *Ibid*.

Tab. 1. French ABCs
(19th century) Abécédaire figuratif, orné de beaucoup de figures, pour esciter la curiosité des enfans
(19th century) Abécédaire miniature en actions
(19th century) Alphabet de l'histoire des animaux, orné 27 gravures
(19th century) Abécédaire des petits enfans, orné de 25 gravures
(19th century) Abécédaire du precepteur français
(late 19th century) Buffon alphabet des animaux
(around 1930) Alphabet du gagne-petit
(1949) ABC à la ferme

Tab. 2. Brazilian ABCs
(1836) Alphabeto Portuguez ou Novo Methodo para aprender a ler…
(1850) Cartas de A, B, C. Primeira colleção de cartas para os meninos e meninas aprenderem a ler em breve espaço de tempo
(1865) Methodo facil de aprender a ler em 15 lições
(1954) ABC de vegetais e animais
(1973) Meu ABC em cores: aves de A a Z
(1976) Meu ABC em cores: aves de A a Z
(1982) De Avestruz a Zebra
(n/d) Meu ABC em cores: animais de A a Z
(n/d) O ABC das aves
(n/d) ABC dos animais e ABC das aves

This set of ABCs was observed from the characterization of the support; format; graphic composition; associations between letters, words, and images inscribed on its pages, in addition to the topographic relations established between them. We also observed the reading protocols in the form of the images represented in the printed material and the «semantics» of the themes about the animal kingdom that they evoke. The association of the children's universe with the vigorous playfulness of the pictures, some very ornate and with magnificent animal traces, even for the most unusual letters in French or Portuguese, such as u, w, x, y, and that required unusual creations, intensified their adoption in these prints. It is worth remembering that the similarity with an illustrated album, whose letters, words, and images are presented as a collection, possibly contributed to sharpen children's curiosity, imagination, and interest.

We started from simple questions, although complex in their possible answers: Was there a circulation of editorial models of prints for children?

How were printed ABCs adapted from one language/context to another and what prevailed? The circulation of themes, words, or images?

The chosen ABCs present recurrences that stand out in the first movement of flipping through its pages. Each letter is associated with an animal, or rather, is the very name of an animal that constitutes the word that evokes and illustrates a certain letter. Some animals are more recurrent, as we can see in Tables 3 and 4, presented below.

We found in several ABCs the same initial letter for the same animal names, although there are some differences in the writing of these words according to each language. If *âne* [donkey] from French corresponds to the letter A for *asno* in Portuguese, thus also for letter E we have *éléphant/elefante* [elephant]; for G, *giraffe/girafa* [giraffe]; for K, *kangourou/canguru* [kangaroo]; for L, *lion/leão* [lion]; for M, *marmotte/marmota* [marmot]; for P, *panthére/pantera* [panther]; for R, *rhinocéros/rinoceronte* [rhinoceros]; for Z, *zébre/zebra* [zebra].

Tab. 3. Animal names with the same initial letter in the ABCs analyzed[34]

BRAZIL	FRANCE
Águia [Eagle]	*Aigle* [Eagle]
Asno [Donkey]	*Âne* [Donkey]
Baleia [Whale]	*Baleine* [Whale]
Dinossauro [Dinosaur]	*Dinosaure* [Dinosaur]
Dromedário [Dromedary]	*Droaire* [Dromedary]
Elefante [Elephant]	*Éléphant* [Elephant]
Esquilo [Squirrel]	*Écureil* [Squirrel]
Formiga [Ant]	*Fourmi* [Ant]
Girafa [Giraffe]	*Giraffe* [Giraffe]
Iguana [Iguana]	*Iguane* [Iguana]
Leão [Lion]	*Lion* [Lion]
Lobo [Wolf]	*Loup* [Wolf]
Vaca [Cow]	*Vache* [Cow]
Zebra [Zebra]	*Zébre* [Zebra]

[34] Only a few words were chosen, included when more than two occurrences were found in the examined ABCs. Survey prepared by the authors.

Other letters and their corresponding words have the same spelling in French and Portuguese, such as jaguar and *tigre* [tiger]. Or the same sound, although a different spelling, such as *canguru/kangourou* [kangaroo]. We also observed the presence of certain animals in both linguistic contexts and their appearance for different letters of the alphabet. We highlight this presence as an indication of adaptations and translations to meet the letters of the alphabet in each language.

Tab. 4. Examples of animals that appear often, although with different spellings and sounds[35]

BRAZIL	FRANCE
Borboleta [Butterfly]	*Papillo*n [Butterfly]
Coelho [Rabbit]	*Lapin* [Rabbit]
Macaco [Monkey]	*Singe* [Monkey]
Joaninha [Ladybug]	*Coccinelle* [Ladybug]
Gato [Cat]	*Chat* [Cat]
Golfinho [Dolphin]	*Dauphin* [Dolphin]
Ovelha [Sheep]	*Mouton* [Sheep]
Pato [Duck]	*Canard* [Duck]
Sapo [Frog]	*Grenouille* [Frog]

It should be noted, however, that several letters have different words in the languages analyzed. Some words have been adapted or replaced, although certain animals appear among the evocative choices in the animal gallery. For example, for S, the frequent choice in French ABCs is *singe* [monkey]. In Portuguese, it corresponds to M, of *macaco*, and is inserted next to it, that is, it persists among the animals chosen with expressive frequency, which illustrates this presence of the same animals, with very similar pictures, although in different initial letters. This procedure involves recreations and operations of translation and adaptation in the set of choices of the same alphabet, which is not something obvious and natural.

Let us take an example that is recurrent in the secular tradition of ABCs, of animals or miscellaneous words: the presence of the word and the image of the *leão/lion* [lion], appearing in a large number of the ABCs examined. We

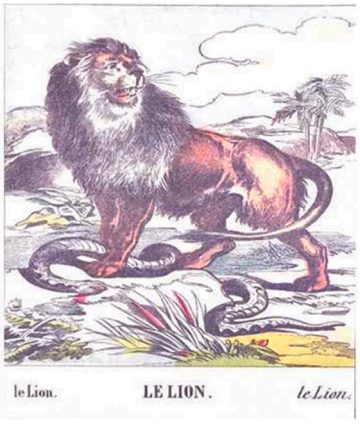
[35] All the words with occurrences in the examined ABCs are highlighted. Survey prepared by the authors.

Pic. 2

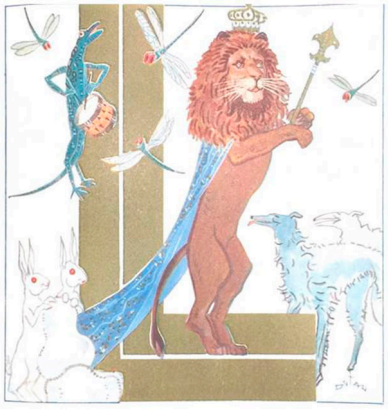
Pic. 3

Pic. 4

Pic. 5



Pic. 6



Pic. 7

Pic. 2. *Abécédaire du precepteur français* (19th century); source: *Abécédaire du précepteur français, indispensable pour l'instruction de la jeunesse*, Paris, Chez Amable Coste. Pic. 3. *Abécédaire des petits enfans* (19th century). [Note that only a single image accompanies the letters in their variations, as well as their word]; source: *Abécédaire des petits enfans, orné de 25 gravures*, Lille, Chez Blocquel. Pic. 4. *Alphabet de l'histoire des animaux* (19th century); source: *Alphabet de l'histoire des animaux, orné de 27 gravures*, Avignon, Chez Pierre Chaillot Jaune. Pic. 5-6. *Buffon alphabet des animauxs*, cover and page of letter L (19th century); source: *Buffon alphabet des animaux*, in Duvallon, *ABC Abécédaires*, cit., Pic. 7. *Alphabet du gagne-petit* (around 1930); source: *Alphabet du gagne-petit*, Paris, Magasin du Gagne-Petit, in Duvallon, *ABC Abécédaires*, cit.

Pic. 8

Pic. 9

Pic. 8. *ABC das aves e ABC dos animais* (20th century); source: *ABC das aves e ABC dos animais*, São Paulo, Edições Castor. Pic. 9. *Meu ABC em cores: animais de A a Z* (20th century); source: Y. Schramm, S. Souza, *Meu ABC em cores, animais de A a Z*, São Paulo, Edições Castor, 1976

can observe the changes in its image, following the technical advances in its reproducibility and printing [Pic. 2; Pic. 3; Pic. 4; Pic. 5 and 6].

The massive entry of color illustrations gives the ABCs a growing vitality and attractiveness. We will continue with the L – *lion* example. In *Alphabet du Gagne-petit*, we found that the animal's name, as well as the attributes that characterize it, are associated with the letters. It is *lion* [lion] that illustrates the letter L, and it is adorned with crown and scepter, in front of his throne, represented by the shape of the letter L, followed by his subjects – *lapin* [rabbit], *loup* [wolf], *lézard* [gecko], and *libellule* [dragonfly], as the king of animals it is, although there is no sentence or text alluding to its royalty. [Pic. 7]

The lion, therefore, is one of the most frequent animals in the ABCs, along with the *asno/âne* [donkey], the *elefante/éléphant* [elephant], and the *zebra/ zébre* [zebra].

In *ABC das aves e ABC dos animais* (Edições Castor), the relationship between the initial letter and the word that names the animal is printed first. The letters are distributed over an entire page, with accent colors for the upper and lower cases. The images appear occupying the entire page just to the side and generally centered. We identified this same mode of distribution in the ABCs *Meu ABC em cores: aves de A a Z*, *Meu ABC em cores: animais de A a Z*, *De Avestruz a Zebra*, and *O ABC das aves*. [Pic. 8; Pic. 9]

We also observed that, even in animal ABCs, only for the letter W, both in Brazilian and French, words that are not animals appear, possibly because of the absence of names in the animal kingdom suitable for beginners learning the ABC that start with this letter. In some French ABCs, there is no animal represented for the letter W, or in some cases English words that are practiced in French were adopted. In *ABC à la ferme*, for example, we noted that the

Pic. 10. *Syllabic quantification. ABC à la ferme* (1949); source: *ABC à la ferme*, Paris, Éditions Bias, Imp. H. Fournier

reference word is «wagon». However, the illustration in the foreground is not the object, but the character that composes the scenery of the field associated with the central theme of this print, the farm, with characteristic representations such as the presence of animals, agricultural products, and a plantation. We can assume that, in the absence of words with W in the French vocabulary that could allude to the farm, the alternative was to use an English word that has a historical use in that country. [Pic. 10]

Regarding the adorned letters, we observed their presence in the ABCs from both countries. In some they were more adorned, in others they correspond, at the time, to the intensive use of calligraphic models for writing. There are also some stylized uses, to address the similarity of the letter with the image associated with it, such as the snake S and the animal illustration, or in the case of the *singe* [monkey], the animal's tail associated with S.

The presence of small texts appears in the French ABCs observed in three ways: descriptive texts with physical characteristics, habits, and places where the animals live (for example, in the *Abécedaire des petits enfans, Abécédaire du precepteur français*, and *Alphabet de l'histoire des animaux*); devotional texts, generally unrelated to the animals illustrated in the ABCs (for example, in the *Abecedaire des petits enfans*); moral texts, from the description of a virtue or sin whose word begins with different letters of the alphabet, sometimes with some association with animals, to texts such as fables with characters from the animal kingdom (for example, in the *Abecedaire des petits enfans*, *Abécédaire du precepteur français*, and *Alphabet de l'histoire des animaux*). In Brazilian ABCs, small texts appears in two ways: rhyme, that is, a stanza with four rhyming verses next to the image of an animal, as in the ABC *De avestruz a*

Pic. 11

Pic. 12

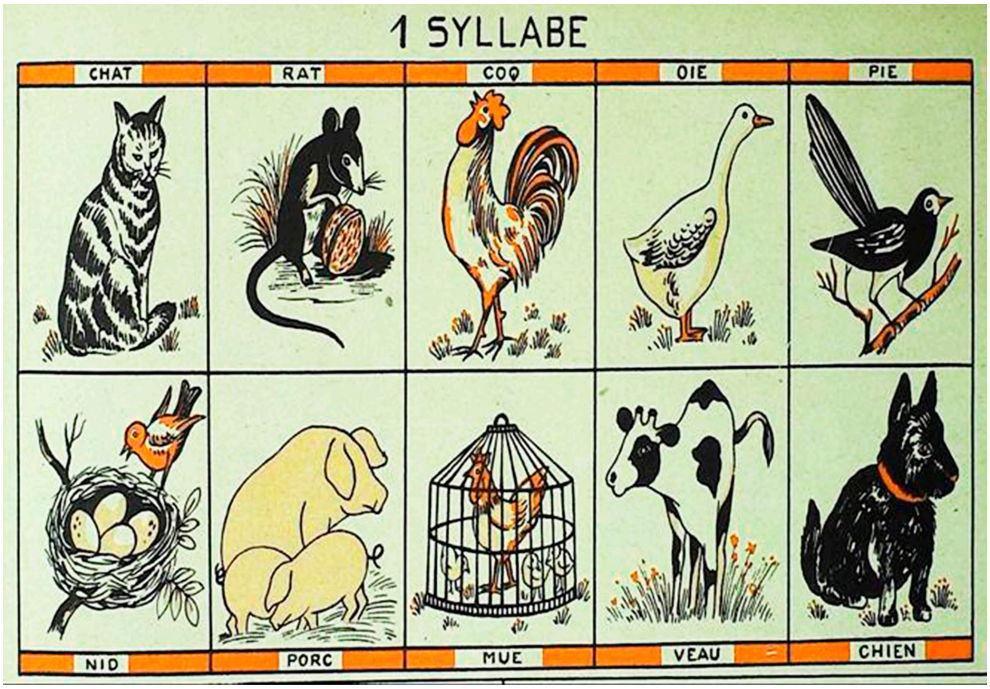
Pic. 11-12. Word written syllabically. *Buffon alphabet des animaux; De avestruz a zebra* (20th century); source: *Buffon alphabet des animaux*, in Duvallon, *ABC. Abécédaires*, cit.; M.F. Carril, *De avestruz a zebra*, São Paulo, Ática, 1982

zebra [Pic. 11]; and description (characteristics of the animals, as in *Meu ABC em cores: animais de A a Z* and *Meu ABC em cores: aves de A a Z*). In different ways, the text seems to show the communicative competence of this type of linguistic unit, inserting the child in the world of reading. There is no regularity in the insertion of letters, words, syllables, and sentences, or even short texts. [Pic. 11-12]

In the French prints *Abécédaire des petits enfans*, *Alphabet de l'histoire des animaux*, *Abécédaire du precepteur français*, and *ABC à la ferme*, the alphabetical sequence appears explicit only with the letters printed on an exclusive page, with no topographic relationship with the images, which may be included before or after, on specific pages, with a letter and the word, or only the letter and the image, or the image and then a brief illustrative text.

This form of appearance of the complete alphabet is found in the oldest Portuguese ABCs in our corpus, such as *Methodo fácil para aprender a ler em 15 lições* and *Alphabeto Portuguez ou Novo Methodo para aprender a ler*, which suggests a convergence of forms among ABCs circulating in France and Brazil in the 19th century.

Another exciting aspect in some ABCs, such as *ABC à la ferme*, is the organization of images by the syllabic quantification of the evocative words [example in Pic. 10], that is, animals with one syllable, two syllables, three syllables. The *Alphabeto Portuguez ou Novo Methodo para aprender a ler* presents a variation of this attention to syllables, with a list of words printed



Pic. 13. *ABC à la ferme* (1949); source: *ABC à la ferme*, cit.

according to the number of syllables, and, among them, the names of the animals that illustrate the letters of the alphabet in the ABC [Pic. 13-14].

In *Buffon alphabet des animaux*, the image evokes the writing of animal words. The registration is carried out by syllabic division in upper case on the left and in lower case on the right [see Pic. 11]. These are distinct and particular forms of appearance that seem to refer to linguistic choices.

Abécédaire figuratif presents the letters of the alphabet, initially without images or words. Ahead in the book, in a type of section entitled «explanation of picture», each picture is accompanied by its letter, its name, its description.

In other ABCs, the entire page seems to have been prepared and decorated from a representational universe associated with the letter, with several illustrations evoking its use, richly composed and capriciously drawn, despite some arduous and suggestive contortions that the artist or author, perhaps the editor, made to oblige children to understand or memorize[36].

A different example from those of the corpus of this article is entitled *Alphabet en images*, published in Paris, 1924[37]. It is evoked here to show the

[36] Embs, Mellot, *Le siècle d'or du livre d'enfants et de jeunesse*, cit., p. 28.

[37] *Alphabet en images*, Paris, Librairie Larousse éditeur, 1924, in Duvallon, *ABC*

Pic. 14. Word written syllabically. *Buffon alphabet des animaux* (n.d.); source: *Buffon alphabet des animaux*, in Duvallon, *ABC Abécédaires*, cit.

diversity of expressive possibilities of illustrated ABCs. In it, the letter Z is represented in a scenario that occupies a page, in which characters, animals, a place, and an action related to Z are presented, and where the letter appears as the highlight of the sentence that is found below the scenario and that describes to the reader: «Zoe, mounting a zebra, goes to the zoo». Z is evoked as a character name, is in action with an animal, the zebra, which appears in an

Abécédaires, cit., p. 27.

unlikely way in the zoo, a place known to prohibit direct contact with animals [Pic. 13]. The other letters, in contrast to Z, have less fantastic scenarios and are closer to childhood experiences, although the playful and recreational character of the print is assured. [Pic. 15]

Sometimes the ABCs resemble picture albums whose collection is the initial letter for each set; in others, they are a heterogeneous thematic universe that seeks to associate all words/images under the same initial letter, regardless of a single theme, such as encyclopedic ABCs.

4. *From animals in gallery to the looks of children and adults*

> The ABC, in its bold illustrations simplicity, is, more than any other book, the reflection of a society and its timethat they present as an ideal to children[38].

The ABCs, especially the illustrated ones, and their chromolithographs of zebras, tigers, lions, jaguars, giraffes, elephants, dromedaries, whales, donkeys, here with the alphabetical order purposely mixed to show how memory is unrestrained and transgressive, have possibly fascinated readers from different contexts, times, generations, social conditions, and religions, who recall them for different aspects. ABCs have provided us certain representations of the world, nature, and usefulness of animals, some even subjected to anthropomorphism. And, simultaneously, they have offered moments of delight and playful games with letters and images, some very expressive and provocative, others simple and easy to memorize. Also, we cannot forget that several images suggested the transcription of their layout, and that some illustrations could be drawn in the form of copies, as inspiring models. Certain animals, across the centuries, are illustrated with few variations and can be recognized without their initial letters, word, syllables, or evocative sentences.

What would have led to the choice of animals as a recurring theme? Naturalism and the emphasis on natural history since the mid-19th century may be one explanation. Print and illustration scholars, such as J. Duvallon, claim that, since 1900, chromolithography has revealed its virtues in animal design, not only for ABCs, but for many other decorative and typographic uses[39]. This technique was largely used by artists who produced representations that were increasingly closer to reality: delicacy of the outline, fidelity to living models, richness of details. We can infer that, before images of animals with such

[38] Embs, Mellot, *Le siècle d'or du livre d'enfants et de jeunesse*, cit., p. 31.
[39] Duvallon, *ABC Abécédaires*, cit.; Id., *Les abécédaires: mots et merveilles*, cit.

Pic. 15. *Alphabet en images* (1924), evocative scenario of the letter Z; source: *Alphabet en images*, in Duvallon, *ABC Abécédaires*, cit.

quality, even in ABCs about other themes, such as fables, children's stories, encyclopedia, or farm, images of animals were also present.

The illustrations became a prominent presence with the dissemination of ABCs in several countries, and there is a certain regularity in the adoption of images of certain animals associated with letters of the alphabet, inserted, in general, as the initial letter of the name of the chosen image, recurrence evidenced in French and Brazilian ABCs since the middle of the 19th century. This means that, in both contexts, the themes associated with natural history, especially the animal gallery, have been the object of preference for publishers, especially those focused on educational editions.

Hasen draws attention to the influential mark of French culture and language both in Portugal and in Brazil from the 19th century onwards, as well as to «the volume of print circulation between these countries»[40]. For the author, the presence of French publishers and booksellers in both countries, their commercial interests regarding the publishing business, and the fact that even Brazilian publishers had their books printed in Portuguese in France largely explains why the translations from French editions were privileged, including children's books[41].

At the end of the 19th century, it was common for publisher and bookseller to assume the same role, as was the case with several publishers in France. After Baptiste Louis Garnier, «publisher-bookseller» of Garnier and one of the partners of the Parisian bookstore Garnier Frères, arrived in Brazil in 1830, he reached a unique and very favorable position in the transatlantic print trade, which led to the constitution of «a true international bookstore network». Garnier's titles were advertised by its catalogs, for example that of 1858, and by advertisements in newspapers and magazines of the time. These catalogs were distributed in commercial establishments or the bookstore customers could request them. They contained a complete or partial list of the works that were available for sale.

Leão, on the other hand, based on the study of Garnier and the history of children's books in Brazil between 1858 and 1920, suggests that what she calls «export vocation of the French book market» takes place since mid-19th century. In her words, there is «an intense movement of cultural exchanges initiated by the international circulation of texts»[42]. The author argues that, from the 19th century onwards, in Latin America, there was «a transfer of literary capital to the countries with still incipient production»[43], as in the

[40] P.S. Hasen, *A literatura infantil no Brasil e em Portugal: problemas para a sua historiografía*, «Sarmiento», n. 20, 2016, pp. 133-161.

[41] *Ibid*., p. 139.

[42] A.B. Leão, *A Livraria Garnier e a história dos livros infantis no Brasil – Gênese e formação de um campo literário (1858-1920)*, «História da Educação», vol. 11, n. 21, jan./apr. 2007, pp. 159-183.

[43] *Ibid*., p. 162.

specific case of France-Brazil relations, since, by the outstanding performance of Editora and Garnier in Brazil, this circulation made it possible to disseminate classic European works on a transnational scale, forming a dynamic that propagated French edition models in Brazil. Her study of the titles in the Garnier Sales Catalog no. 14, dated from 1858 for Brazil, leads the author to state that «these books were intended for both French and Brazilian children and young people, in a clear strategy to establish a common cultural universe between these two communities, thus we can suggest illustrated animal ABCs as examples of the cross-cultural circulation of editorial models»[44]. Beltrão points out that the Garnier bookseller-editor brothers, as part of their editorial performance, worked on different processes of translation and adaptation of texts, by procedures of suppression, correction, and addition of passages, hence «the importance of going beyond textual criticism and start from the study of the cultural configurations in which books are produced and transmitted, especially to understand the logic of imports and translations as well as the movement of cultural exchanges, such as international circulation, imports and adaptations of classic texts»[45].

Dutra also analyzes a series of catalogs from Livraria Garnier, especially the 1863 catalog, which, according to the author, presented news compared to those previously published. It was written in Portuguese and offered titles in that language, signaling, therefore, that Garnier's previous catalogs in Brazil and the books listed were printed in French[46]. The author points out that, in the 1863 catalog, there is a note explaining that all volumes were printed and bound in Paris, even those translated, this being a characteristic of Garnier in the period. In an examination of the 1920 Garnier catalog, Dutra notes a significant increase in titles and that other subjects are inventoried, including «alphabets and elementary reading books». The addition of this topic includes «writing and reading handwritten notebooks, calligraphy notebooks, alphabets, books of arithmetic and metric system notions, reading, writing […]»[47]. Thus, Garnier's catalogs show the existence of connections between Brazil and France in the transatlantic trade, when this bookstore and publisher prints thematic titles of alphabets, reading books, and courses with methods for learning how to read, which included illustrated ABCs such as the ones we analyzed.

[44] *Ibid*., p. 178.

[45] *Ibid*., p. 179 and p. 181. On the other hand, P.T. Raffaini highlights that B.L. Garnier, the French editor in Brazil, «chose what should be translated, in what format the book would appear, and also designated the translator of the work and the format into which it would be translated, in full or adapted». P.T. Raffaini, *A Livraria Garnier e a tradução e edição de livros para a infância (1890-1920)*, in A.M.C. Gomes, P.S. Hasen (edd.), *Intelectuais mediadores: práticas culturais e ação política*, Rio de Janeiro, Civilização Brasileira, 2016, p. 68.

[46] E. Dutra, *Leitores de além-mar: a Editora Garnier e sua aventura editorial no Brasil*, in A. Bragança, M. Abreu (edd.), *Impresso no Brasil: dois séculos de livros brasileiros*, São Paulo, Editora UNESP, 2010, pp. 67-87.

[47] *Ibid*., p. 83.

Thus, the several studies developed by Brazilian researchers, previously highlighted[48], show that, especially from the 19th century, books of all types and tastes arrived at Brazilian ports from different parts of the world. Numerically, the French stood out. The analysis of the catalogs confirms that several prints for elementary instruction also crossed geographical, linguistic, and cultural boundaries, having circulated in Brazil.

We followed the path of researchers in the Garnier catalogs, and, on the website of the National Library of France, we found the description of an *Abécédaire (portugais)*[49], published[50] in 1835 and entitled *Alphabeto Portuguez ou Novo Methodo para aprender a ler, com muita facilidade e em mui pouco tempo tanto a letra redonda como a manuscripta*. It is said that it includes «the history of several animals, from selected Aesop's and La Fontaine's fables; moral maxims; proverbs useful to young people; a comparative table of Arabic and Roman numerals, and the multiplication table. Ornate with numerous prints»[51].

We found another ABC entitled *Abécédaire (portugais)*[52], from 1865, included in the catalog[53] under the title *Methodo facil para aprender a ler em 15 lições*, and the description of the book states that it has

> […] all the prayers that a Christian must know; the natural history of Brazilian animals; fables, moralities, maxims, and thoughts by the best authors; and the Arabic and Roman numerals, with a table by Pythagoras. Useful work for Brazilian and Portuguese youth, for parents and teachers. Illustrated with numerous prints[54].

This description indicates the existence of ABCs that were printed in France, in Portuguese, and that possibly circulated in Brazil. Regarding the 1865 catalog, there is strong evidence of this circulation because, as we stated earlier, the Garnier publishing house adopted as a measure to print translated texts in France and circulate the already printed volumes in Brazil.

[48] Among them, we highlight: Leão, *A Livraria Garnier e a história dos livros infantis no Brasil – Gênese e formação de um campo literário (1858-1920)*, cit.; Dutra, *Leitores de além-mar: a Editora Garnier e sua aventura editorial no Brasil*, cit.; M. Abreu, *Circulação de livros entre Europa e América*, «Polifonia», EdUFMT, vol. 14, 2007, pp. 161-174; Hasen, *A literatura infantil no Brasil e em Portugal: problemas para a sua historiografía*, cit.; Raffaini, *A Livraria Garnier e a tradução e edição de livros para a infância*, cit.; T.C. Ferreira, *Comércio de livros: livreiros, livrarias e impressos*, cit.

[49] Cataloging specification: *Bibliothèque nationale de France*.

[50] Publication: *Paris, em casa de J.-P. Aillaud, quai Voltaire, 11. Paris, Imprimerie de Bourgogne et Martinet, rue du Colombier, 30*. Available from: <https://catalogue.bnf.fr/ark:/12148/cb39111704j.public> (last access: 07.04.2020).

[51] Cataloging specification: *Bibliothèque nationale de France*.

[52] *Ibid*.

[53] Rio de Janeiro, B.L. Garnier, livreiro-editor, rua do Ouvidor, 69; Paris, Aug. Durand, livreiro, rua des Grès, 7, dated from 1865, whose printing was carried out in Paris by Typographie de Ad. R. Lainé et J. Havard, rue des Saints-Pères, 19. Available from: <https://catalogue.bnf.fr/ark:/12148/cb39118723h.public> (last access: 07.04.2020).

[54] *Ibid*. (The spelling of the period was maintained).

A note to highlight that is significant to think about this circulation of the ABCs refers to the one entitled *Methodo facil para aprender a ler em 15 lições*, from 1865, whose editors are, in Rio de Janeiro, B.L. Garnier, and, in Paris, Aug. Durand. It is a print entirely in Portuguese that adopts the system, according to the editor, already adopted in France for several years. Its introduction states:

To be used by the Brazilian youth, and to facilitate their knowledge of reading, the following system is introduced to parents, already adopted in France for several years, and whose results have been immense, for having discarded the useless and boring books of b, a, ba, making the children spell immediately after knowing the letters; in 15 lessons, a boy can read[55].

Note, therefore, the explicit reference to the previous adoption of this «successful method in France». However, and this is the point that we would like to emphasize to indicate the cross-cultural circulation of editorial models, the introduction of this ABC highlights the adoption of elements of Brazilian natural history, cultural context in which the publishers wanted to disseminate the print. This introduction clarifies the reason for choosing the print model (letter accompanied by an illustration and word), as well as the fauna and flora of Brazil, since it was Brazilian children who should be educated:

> [...] to incite the lively imagination of children, placing at the foot of each alphabet letter an object, animal or plant, whose name begins with the same letter to which it is attached; and among these objects, animals or plants, we always chose those that are found in Brazil, or come from it[56].

And in fact, macaw, calf, emu, tayra, alligator, tortoise, otter, jaguar, peccary, parakeet, thrush, anteater, vulture, deer, black jack, oropendola and drone are typical animals of the Brazilian fauna at the time, and the other images that illustrate the alphabet letters are examples of its flora. In addition, in the animal description texts, not only the mention of Brazil is included in all texts that accompany more Brazilian fauna animals – *anta* [tapir], *beija-flor* [hummingbird], *cão* [dog], *cigarra* [cicada], *ema* [emu], *formiga* [ant], *irára* [tayra], *jacaré* [alligator], *kagado* [tortoise], *lontra* [otter], *macaco* [monkey], *onça* [jaguar], *periquito* [parakeet], *preguiça* [sloth], *queixada* [peccary], *rã* [frog], *sabiá* [thrush], *sucuri* [anaconda], *tamanduá* [anteater], *tatú* [armadillo], *veado* [deer], *xaréo* [black jack], *yapú* [oropendola], *zangão* [drone], the latter

[55] *Methodo Facil*, 1865, p. V. «Para a utilidade da mocidade brasileira, e para lhe facilitar o conhecimento da leitura, apresenta-se aos pais de familia o seguinte systema, adoptado em França ha já muitos annos, e cujos resultados têm sido immensos, por ter dispensado as inuteis e enfadonhas cartas do b, a, ba, fazendo passar os meninos a soletrar que immediatamente que conhecerem as lettras; em 15 lições póde um menino saber ler». (The spelling of the period was maintained).

[56] *Ibid*., p. VI. «Excitar a imaginação viva das crianças, pondo ao pé de cada uma das lettras do alphabeto um objecto, animal ou planta, cujo nome principie pela mesma lettra á qual fica annexo; e entre estes objectos, animaes ou plantas, escolheu-se sempre os que se achão no Brasil, ou são privativos d'elle». (The spelling of the period was maintained).

curiously distinct from the vast majority of ABCs, which invariably illustrate the letter z with zebra. This observation leads us to indicate that, if the literacy system, successful and applied in France, justified its printing in Portuguese, this did not mean that the editors had neglected the evocative words and illustrations for each cultural context. Thus, the prints/illustrations they chose are those typical of the Brazilian fauna and flora, a crucial aspect to think about the transcultural circulation of the ABCs.

A print from 1836, which has many similarities with the *Methodo Facil* from 1865, and which possibly preceded the latter, has the main title of *Alphabeto Portuguez ou Novo Methodo para aprender a ler com muita facilidade e em mui pouco tempo*, accompanied by the caption: «both round and handwritten letters; including the history of several animals, from selected Aesop's and La Fontaine's fables; moral maxims; proverbs useful to young people; a comparative table of Arabic and Roman numerals, and the multiplication table. Ornate with numerous prints»[57], printed in Paris, «At the home of J.-P. Aillaud», therefore indicating that another editor, almost forty years earlier, held its printing. Note that in this *Alphabeto portuguez* there is no reference to the Brazilian fauna and flora, nor are the animals chosen characteristic of the context to which it is addressed, since dromedary, elephant, peacock, salmon, tiger, bear, and zebra are illustrated there. Even the texts referring to the description of the animals – «Short story of some remarkable animals, accommodated to the capacity of the children» –, unlike the 1865 print, do not contain an adaptation to Brazil (for example, texts for elephant, lion, tiger, dromedary, etc).

The inclusion of the ABC in the history of literacy and, more broadly, of schooling, implies analyzing it as a textual genre invented, imitated, translated, adapted, disseminated, transformed for school purposes, which deserves particular attention, but also for other purposes, as a model for the distribution of content, images, lessons, or maxims according to the alphabetical order. As we mentioned earlier, the letter & image structure, whose name is associated with it since the first letter of the word that expresses it, is now applied to different themes, purposes, uses.

The secular tradition of the ABCs seems to resist many revolutions in the supports of writing and reading, as well as of their social and educational uses. That is why they are renewed and, at the same time, they maintain a graphic form and a «normative hexis» present in the oldest prints and that have followed the ABCs since their emergence as a device for accessing written culture at different times.

[57] *Alphabeto Portuguez ou Novo Methodo para aprender a ler, com muita facilidade e em mui pouco tempo, tanto a letra redonda como a manuscripta; seguindo a historia de diversos animaes*, Paris, Imprimerie du Bougogne et Martinet, 1836.

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Professional press for teachers as a source to study schooling practice: «El Magisterio Balear» (1873-1916)[1]

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ABSTRACT: Beyond articles and theoretical reflections on highly diverse topics linked to schooling, professional publications for teachers contain testimonials from teachers describing their daily work in the classroom. In this sense, they are potentially useful sources to uncover historical knowledge on daily life in schools. This article analyses the journal «El Magisterio Balear» from the period spanning 1873-1916, with a view to locating articles where teachers describe their work and, in this way, demonstrate the value of professional publications for teachers as a testimonial source for analysing schooling practices.

EET/TEE KEYWORDS: Education; Pedagogical press; Teaching; School practice; Balearic Islands; XIXth - XXth Century.

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Introduction

In order to uncover what school practice must have been like in the past, studies have traditionally used administrative and legislative texts and sources, as well as theoretical discourses. The importance of this type of resource has provided incomplete and even distorted knowledge on what schooling was really like in the past. The near-exclusive use of these sources has led to a portrayal where both discontinuity and rupture stand out which, at times, could be quite different to everyday reality. Schools have their own timelines and practice too has its own rhythms that differ from those set out in educational policy or in pedagogical approaches. Questions such as, to what extent and at what speed does a law change practices in the classroom, and how does the theoretical expansion of a new method affect changes in schooling, become a conundrum whose response must include a combination of traditional and less frequently used sources so as to help us properly understand what actually occurred in classrooms, the practices used by teachers and the dynamic established in schooling beyond legal provisions or theoretical discourses.

In recent years, the History of Education Studies Group (GEDHE) has attempted to approach the historical study of schooling by combining traditional sources with those that offer more direct information on everyday school activities, such as materials, personal testimonies, photographs, practice or official exam reports, student and teacher workbooks, teacher diaries, etc. The intent is to understand the inherent dynamics at schools alongside their continuity, changes and ruptures, as well as the role of teachers (at times supervised or even imposed, whilst at others independent and free from outside influence) in the historical evolution of teaching and learning processes.

This article focuses specifically on professional publications for teachers from amongst the sources included in the historical analysis of schooling. Teaching journals, as part of the wide selection of pedagogical press, appeared and proliferated during the last third of the 19th century, offering teachers, readers and subscribers hugely valuable information about new ideas and pedagogical methods, debates on school organisation, pioneering schooling experiences, etc. whilst keeping them up-to-date in terms of professional issues (pay, rights, etc.) and educational legislation. In turn, teachers would not only be recipients of this information but rather active participants in certain debates on educational issues affecting them at the time, setting out their own ideas and practical experiences in the journals. The experience of writing about practice – involving descriptions interwoven with both individual and group testimonials from teachers – undoubtedly represents an essential source for historians when looking at everyday schooling practice from the past.

The contributions from the teachers/readers themselves in professional publications thus become a hugely valuable resource for studying school practice, enabling us to uncover to what extent theoretical discourses and

legal provisions were taken onboard by the teaching profession and directly affected daily practice at schools. In this vein, the publications became a type of «sounding board» that amplified the voice of teaching experiences. They became a place to think and debate other ways of being, doing and fashioning schooling, as well as developing the teaching profession: a space for pedagogy in the widest possible sense, opening up broad possibilities by bringing together teaching approaches and habits. Ultimately, the journals show the everyday tensions of active teachers that affected their work as instructors and teaching and learning practices.

This article aims to underscore the value of professional teaching publications as a source to study schooling, using «El Magisterio Balear» as an example. Based on a previous study of the journal[2] (which was published with several hiatuses between 1873 and 1936), this article focuses on the period comprising 1873 to 1916. The reason for selecting this timeframe is that the publication saw the fewest hiatuses during this period, had a stable editorial policy and all issues have been preserved, which is not the case with later issues. Between 1873 and 1916, «El Magisterio Balear» published nearly 800 articles, many of which came from other journals, with theoretical reflections and information on pedagogical and educational issues in general, as well as on specific topics. Nonetheless, and albeit in lower numbers, some teachers also made contributions to these issues based on their specific schooling practices, contributing their personal experience to professional knowledge and debate. They are articles where teachers in the Balearic Islands explain (with regard to the topics covered on a theoretical level in the journal) what they do at their institutions, how the schools are organised, which materials they use, what activities they undertake, etc. This type of text was not the most common, although we believe – and will attempt to demonstrate in this article – that their existence represents a highly useful resource for the historical analysis of schooling practice.

After a description of «El Magisterio Balear» within the context of professional pedagogical publications in Spain between the end of the 19th and early 20th centuries, we move on to an analysis of the main contributions made by teachers from the Balearic Islands to the journal, in the aim of demonstrating the usefulness of these types of texts as historical sources to study schooling practice, as well as how this practice links to pedagogical discourses and debates from the time that were reported on by the journal itself.

[2] Some results from research into «El Magisterio Balear» that came out before this article can be viewed in: F. Comas Rubí, B. Sureda Garcia, *La premsa pedagògica en la construcción de la identitat professional dels mestres: El Magisterio Balear*, «Educació i Història», 24, 2014, pp. 51-68; S. González Gómez, F. Comas Rubí, *Experiencias prácticas del magisterio a través de la prensa profesional*, in J.Mª. Hernández Díaz (ed.), *La prensa pedagógica de los profesores*, Salamanca, Ediciones Universidad de Salamanca, 2018, pp. 193-203; F. Comas Rubí, B. Sureda Garcia, *La premsa pedagògica en la construcción de la identitat professional dels mestres: El Magisterio Balear*, «Educació i Història», n. 24, 2014, pp. 51-68.

1. *The origins of professional publications for teachers: «El Magisterio Balear»*

During the 19th century, two events highlight the rapid professionalisation of teaching: the foundation of professional teaching associations and the creation of professional pedagogical publications[3]. As Checa Godoy explains in *Historia de la prensa pedagógica en España*[4], the origins of the educational press in Spain can practically be traced back to the start of press publications themselves.

The «Gazeta de los niños» was first published in Madrid in 1798 by José and Bernabé Canga Argüelles, whilst «El Maestro Público» looking into teaching methodology also appeared in the capital around the same time. Both publications had a liberal bent, although «La Gaceta de los niños» was the more restrained and paternalistic of the two. «El Magisterio Español» appeared in 1868, introducing a catholic approach into educational publications. Indeed, there was a wide selection of educational publications in Spain just before the Glorious Revolution of September 1868*:* «Los Anales, La Educación», «La Enseñanza», «La Idea», «El Magisterio Español», «El Preceptor» and «La Primera Enseñanza», which were distributed to schools and teachers across Spain. «El Clamor del Magisterio», «El Instructor», «El Monitor», «El Profesorado» and «El Protector» were aimed more at university spheres. Most of the journals, except for «La Educación» and «El Magisterio Español» were limited to primary education.

School presses, i.e. school newsletters, began to appear during the six revolutionary years of the *Sexenio Democrático* (1868-1874) (Revolutionary six-year period 1868-1874). There would be no major increase in titles during these six years although certain provincial educational publications did appear. In any event, the Restoration was the key period where a wider selection of specialised publications in education would develop. There was a rise in the number of periodical publications from 1875 to 1900. Most new titles were professional teaching journals, although there was also a considerable increase in the number of Catholic teaching journals. Unlike most professional teaching journals that defended professional interests, as well as introducing and promoting the first educational innovations from those years, Catholic journals defended a much more traditional pedagogical approach. The most representative school publication from this initial period of the Restoration

[3] In recent years, several conferences held in Salamanca have brought together the work of a broad group of researchers into pedagogical publications. See, for example, J.Mª. Hernández Díaz (ed.), *La prensa pedagógica de los profesores*, Salamanca, Ediciones Universidad de Salamanca, 2018. J.Mª. Hernández Díaz (ed.), *Prensa pedagógica y patrimonio histórico educativo. Contribuciones desde la Europa mediterránea e Iberoamérica*, Salamanca, Ediciones Universidad de Salamanca, 2013.

[4] A. Checa Godoy, *Historia de la Prensa Pedagógica en España*, Seville, Universidad de Sevilla, 2002, pp. 181-184.

was undoubtedly the «Boletín de la Institución Libre de Enseñanza» which, although not having widespread distribution, did have a decisive impact on innovation in teaching in Spain.

At the end of the 19th century, there were both conservative, Catholic educational publications alongside more liberal journals in many provinces. Nevertheless, the largest number of journals were developed and led by teachers at their professional associations which would, in many instances, enjoy a long life. According to Ezpeleta Aguilar[5], around 1898 all provinces had specialised journals: «El Monitor de Primera Enseñanza» and «El Clamor», in Barcelona; «El Magisterio Balear» in Palma; «El Riojano» in Logroño; «La Voz del Magisterio» in Zaragoza; «El Profesorado» in Granada; «El Boletín de Primera Enseñanza» in Santander, etc. All these publications followed a similar pattern, usually being published every fortnight, every ten days or weekly, and had a similar extent and format. Moreover, they shared an interest in publishing the difficulties of teachers as a professional group, with complaints about buildings, materials, salaries, etc. None of these journals was openly anti-clerical, likely due to there not being too many openly Catholic journals to protest against.

Whilst it is true that purely pedagogical interests were abundant in these journals, they also contained a wealth of essentially professional content. Some things would change from the 20th century onwards. At government level, the creation of the Ministry for Public Instruction and the state paying teachers' wages meant that certain «classical» professional demands no longer made sense. Furthermore, new trends taken from Marxist-leaning educational experiences were introduced. Rationalist pedagogical publications appeared in Catalonia and Valencia, based on the experience of Ferrer Guardia's Modern School. Lázaro Lorente has made an in-depth analysis of these journals, which usually viewed the liberal state and power as the main enemy[6]. In turn, some innovative Catholic journals appeared, e.g. those serving as a focal point for experiences, such as those from Andrés Manjón, or certain small publications founded by teachers at their own schools – a paradigmatic example of the latter being the publications by Minorcan teacher Juan Benejam.

As the 20th century progressed, a wide number of new journals would appear with, at times, opposing views with regard to basic teaching approaches. According to a study by José Altabella, the first pedagogical journal for teachers in the Balearic Islands was the «Boletín del Magisterio de Primera Enseñanza» from 1868; the journal likely ceased publication shortly afterwards as there is little mention of it in later years[7]. As Checa Godoy points out «[…] Although

[5] F. Ezpeleta Aguilar, *Literatura y Prensa del Magisterio en el XIX*, «REIFOP», vol. 11, n. 2, 2008, pp. 85-92.

[6] L.M. Lázaro Lorente, *Prensa racionalista y educación en España*, Valencia, Universidad de Valencia, 1995.

[7] J. Altabella, *Notas urgentes para una historia de la prensa balear*, «La Estafeta Literaria», n. 226-227-228, Madrid, 1969.

the Balearic region had a wealth of journalism titles from early on, often at the vanguard and of excellent quality, it is true that educational publications in the Balearics have been relatively scant until today, despite the region having one of the highest media densities in Spain»[8].

Support for this argument is quite clear given that «El Magisterio Balear» would have practically no competition for over fifty years.

The most immediate precursor to «El Magisterio Balear» was the newspaper «El Fomento Balear»; likely to have been published every ten days or every fortnight, it would disappear in December 1872 after three years in print. One of the last issues on 3rd December 1872 published the regulations for a Balearic Teaching Association founded in August 1872, whose mouthpiece would be «El Magisterio Balear». In this sense, the new journal was a successor to «El Fomento Balear» and would release its first issued in January 1873[9]. Although initially released every ten days, it would become a weekly at the end of its first year until its final issue, and although having a modest print-run never surpassing 500 issues, it had a huge influence on public school teaching[10].

«El Magisterio Balear» began publication on 10th January 1873 and the final issues were released at the outbreak of the Spanish Civil War. After a brief hiatus, a new period began in 1900 with another printing house – the Imprenta del Comercio run by Francisco Soler. The journal was published every ten days during its first nine months to then switch to weekly release from 27th September 1873. It would always be known as «El Magisterio Balear», although a changing subtitle would be added to the generic masthead. Initially, the journal went by «El Magisterio Balear: periódico de primera enseñanza» [primary education journal]. This subtitle would remain until 3rd September 1892, when it changed to «El Magisterio Balear: periódico semanal de primera enseñanza, órgano de la Asociación de Maestros de esta Provincia» [weekly primary education journal from the Association of Teachers of this Province].

8 Checa Godoy, *Historia de la Prensa Pedagógica en España*, cit., p. 181.

9 «El Magisterio Balear», n. 1, 1873, p. 1.

10 Very few pedagogical journals would appear in the Balearic Islands from the foundation of «El Magisterio Balear» to well into the 20th century. The «Boletín de la Escuela Mercantil» came out in 1880, which changed to the «Boletín de la Institución Mallorquina de Enseñanza» – a mouthpiece of the decidedly institutional school created by Alejandro Rosselló and Mateu Obrador in 1880. «El Eco del Magisterio» would be published during a brief two-year hiatus of «El Magisterio Balear», between 1898 and 1900. Juan Benejam, a teacher from Ciutadella, would also set up a journal on education in 1883, known as «La Escuela Educativa». «El Magisterio Asociado» would be published in Manacor from 1884, although its distribution was highly limited. Moreover, only two monthly journals would take an interest in educational issues, amongst other topics: «El Ateneo» (1890-1892) and «Los Libros» (1890-1898).
At the start of the 20th century, rationalism would mainly develop in Minorca in line with the model followed by Ferrer Guardia's Modern School. The «Libre Concurso» journal was founded on the island in 1902, supported by the teacher Sebastián Suñé. The journal's distribution was very limited. Years later, and also coming out of rationalist education circles, «Escuela Moderna» would be published in Alayor (Minorca).

The first issue in 1909 would replace *periódico semanal* to *seminario* [weekly] and initially remove the reference to the Balearic Association of Teachers, to then re-insert it at the start of 1916. Over the decades, several people would serve as editors, including Antonio Umbert, Juan Vadell, Matías Bosch, Dionisio Vidal, Jerónimo Castaño and Bartolomé Terrades, each of whom added nuances that in no way altered the essence of the liberal, measured and receptive journal.

Between 1873 and the outbreak of the Spanish Civil War, «El Magisterio Balear» seemed to suffer hiatuses in its print-run, although this cannot be completely confirmed as there is no full collection of the journal in local or state libraries or archives, nor has any complete set been located in private hands. The first consistent publication period runs from its creation in 1873 to 1916. Printing was only interrupted during this period from late August 1898 to October 1900, when it was restarted with a reset numeration. During the interval, «El Eco del Magisterio» was founded which, despite attempts to differentiate itself, largely resembled «El Magisterio Balear». «El Eco del Magisterio» only managed a brief run since it was unable to attract advertisers or financial contributions from teachers in the Balearics. We believe that between 1916 and 1923, «El Magisterio Balear» likely suspended publication as no issue of the journal has been found from that period and no references are made to it in other articles published at that time. It would seem that in its place, during this presumed interruption, the «Boletín del Museo Pedagógico Provincial de Baleares» became the teaching journal in the Balearic Islands. After 1924, and until its final disappearance in 1936[11], random issues of the journal have been unearthed.

«El Magisterio Balear» covered highly diverse topics. Most articles are theoretical reflections on issues such as education for health, physical exercise at schools (physical education, gym, games and sports), walks and excursions, and school camps. There are also many articles on school organisation, class grades in schools and teaching systems such as the cyclical/spiral method, school spaces and materials, discipline, prizes and punishments, manual work, art education, civic education, comparative education, school libraries, school building societies and mutual societies, social education and childhood protection, special education, infants, women's education, psychological studies of childhood and topics related to didactic methodology. In addition to all this, there are articles that have a constant presence throughout the life of the journal dealing with complaints and demands from professionals.

Below is a look at how, in the context of articles on theoretical reflections and regarding different pedagogical issues at the time, teachers make their own contributions setting out their experiences and opinions based on their own practice.

11 About the later years of the journal, please see: A.J. Colom Cañellas, *La renovació educativa a El Magisterio Balear en temps de la Segona República*, «Educació i Cultura», vol. 21, 2010, pp. 61-80.

2. *The practice of teachers as reflected in «El Magisterio Balear»*

One of the first areas selected for this article due to its spotlight in the journal concerns school organisation. The first attempts to separate schools into grades or the introduction of the spiral curriculum comprise some of the experiences detailed by teachers in the Balearic Islands in the pages of the journal. Before going any further, it would be wise to provide a brief overview: public grade schools were legally established in Spain in 1898. Royal Decree of 23rd September 1898 and its implementing regulations of 29th August 1899 attempted to set up trials for an organisational model that would only temporarily apply to practical teacher training schools [escuelas anejas] annexed to the Teacher Training Schools [Escuelas Normales][12] for teacher training. At a formal level, the grading system in teaching comprises grouping pupils in terms of age or knowledge level to form more standardised groups (sections, in the terminology used at the time) where teachers could provide better didactic attention. The outcome is schools organised into several classrooms, each containing a group or section led by a teacher. These schools were known as *graduadas* or grade schools to differentiate them from those with all grades being taught in the same classroom (*unitarias* or unitary schools)[13].

In Majorca, grading in education began in the final 25 years of the 19th century. Both the Guillem Cifre de Colonya School and the called *Escuela Mercantil* [Commercial School] in Palma followed the guidelines set by the *Institución Libre de Enseñanza* [Free Institution of Education], providing graded education. The initial experiences of grading in public schools came from Miquel Porcel i Riera (1869-1933)[14], who was one of the most representative proponents of contemporary pedagogy in the Balearic Islands and organised the practical teacher training school annexed to the Normal School into grades, as per government stipulations approved between 1898[15] and 1899. Although the general status of Balearic schools mostly followed the unitary model, some

[12] A. Viñao Frago, *Innovación pedagógica y racionalidad científica*: *la escuela graduada pública en España (1898-1936)*, Madrid, Akal Universitaria, 1990, p. 13.

[13] A.D. Galera Pérez, *Escuela pública durante la I Restauración (1875-1931): Aspectos administrativos y curriculares*, «Cabás», n. 19, 2018, p. 20.

[14] For more on Miquel Porcel i Riera, see, A.J. Colom, *D. Miquel Porcel Riera i els inicis de l'activisme escolar a Mallorca*, Palma, Centre d'estudis socialistes Gabriel Alomar, Gràfiques Miramar, 1984; P. Payeras, *Miguel Porcel y Riera (1869-1933). Manuales escolares cíclicos y activismo escolar*, Doctoral Thesis, Department of History of Education and Comparative Education, (Supervisors: A. Tiana and B. Sureda), Madrid, Universidad Nacional de Educación a Distancia, 2008; F. Comas, *Introducción y primeras aplicaciones del slöjd –trabajos manuales según el sistema de Nääs (Suecia) – en España*, «Historia de la Educación. Revista Interuniversitaria», n. 20, 2001, pp. 261-282.

[15] Taking advantage of the reform in Normal Schools for Teacher Training where the annexed practical schools were split into grades, it was solely stated that students would be divided into three or four sections, depending on the age and education level of each (Royal Decree of 23rd September 1898, Art. 2 and 3).

teachers such as Porcel attempted to organise education into grades. This was true for Gabriel Comas (1864-1942)[16], a renowned professional who actively took part in the most important demonstrations for educational reform in the Balearic Islands between the late 19th and early 20th centuries. In 1894, this teacher had already separated the unitary school in Alayor (Minorca) into three grades and applied the cyclical model, as shall be detailed below[17]. In turn, Porcel ran the Teacher Training School and also organised it into educational grades at around the same time as Comas was working in Minorca. In 1895, he published a book on how to organise education in line with the cyclical model based on his experience in separating his school into four grades[18]. Although Comas and Porcel's contributions are pioneering both in grading education and applying the cyclical model, further experiences from subsequent years will be looked at that demonstrate an attempt to establish grades in public schools.

In 1901, Porcel himself insisted in the pages of «El Magisterio Balear» that it was possible to grade large schools in Palma without having to change buildings or invest large sums of municipal money. He believed that by using auxiliaries, the largest schools could be organised into grades and thus offer higher quality teaching[19]. His article had widespread impact, as demonstrated by the response from some teachers in later articles who supported Porcel's proposal. This was the case with the teacher in the Majorcan village of S'Arracó, B. Esteva Salvá, who stated that grades represented the modern system for school organisation. According to Esteva, the mixed system – derived from the Lancastiran system – used in Balearic schools throughout the 19th century was now outdated and relegated by a system of the future: the grade system. Moreover, Esteva stated that teaching by grades also meant using the cyclical method for learning as grading would not only be a way to organise schools but also a true methodological reform[20]. There are further testimonials from teachers who, on their own initiative, organised their schools into grades. For example, in 1903 Juan Llarena explained the following:

> My rural school has been split into grades. […] I found pupils split into 6, 7 or 8 sections and lessons from 1857. I have separated the 80 pupils into four Schools, yes, four Schools: it is my grade school… my faux grade school, as there is only one teacher. They are not

16 R. Bosch Contestí, *Gabriel Comas i Ribas. Un mestre del seu temps*, Palma, Ajuntament d'Esporles, 1991.

17 G. Comas, *Posibilidad de dar en nuestras escuelas la enseñanza enciclopédica y cíclica*, «El Magisterio Balear», n. 29, 1894, pp. 3-4.

18 M. Porcel Riera, *Curso completo de enseñanza primaria con arreglo al método cíclico*, Palma de Mallorca, Imprenta Rotger, 1895.

19 M. Porcel, *Auxiliares*, «El Magisterio Balear», n. 25, 1901, pp. 4-5.

20 B. Esteva Salvà, *Organización de las escuelas públicas. Sistema moderno*, «El Magisterio Balear», n. 38, 1901, pp. 358-360 and B. Esteva Salvà, *Organización de las escuelas públicas. Sistema moderno*, «El Magisterio Balear», n. 39, 1901, pp. 373-375.

sections but something else: Schools without a Teacher, headless bodies; in reality, it is highly unfortunate[21].

These experiences are hugely interesting but remain rudimentary in their nature. The very teachers implementing the grading acknowledge, as evidenced by the previous paragraph, the precarious nature of their initiatives meaning that despite highlighting their work, they demand political commitment to grade schools, as well as the means to fully take advantage of this new system for school organisation. They rightly sense that legal reforms need to be supported by other interventions that impact what one could call school culture, helping teachers to assimilate not only was is legally stipulated but also the underlying pedagogical foundations. The legal recognition demanded by teachers for grading in schools would not arrive until the 1910s. At that time in the Balearic Islands, the first municipal grade school was being built. Beforehand, Palma city council sent two teachers from public primary schools – Bartomeu Terrades and Gabriel Comas – overseas to analyse how grade schools operated in other countries, as well as the material used. This pedagogical exchange in France, Belgium and Switzerland was essential to the *Escuela Graduada* [Grade School] finally opening in Palma on 17th July 1913[22]. Once the school was opened, «El Magisterio Balear» continued to publish articles on the pros and cons of grade schools compared to unitary schools.

Directly linked to the issue of grade schools is the cyclical method, whereby knowledge is organised by year so that each course worked on the same knowledge area and progressively expanded its complexity. The aforementioned teacher, Gabriel Comas, was the first in the Balearic Islands to publish an article on cyclical learning. In 1894, this Majorcan teacher working in the town of Alayor (Minorca) published an article in «El Magisterio Balear» entitled *Posibilidad de dar en nuestras escuelas la enseñanza enciclopédica y cíclica* [The possibility of providing encyclopaedic and cyclical education in our schools]. At the time, Comas was working in a unitary school that he described in the following manner: «The premises are a 4½ m wide x 13 m long x 3 m high room without a patio, with little light or ventilation […] I have had average attendance of 65 pupils (from a register of 75) this year, with the youngest being five years old, the oldest being 11½ years old and only six being older than 12»[23].

In these circumstances, Comas implemented the cyclical method by splitting his pupils into three groups, with each having a full programme for every subject. Comas's article dates from 1894, although he may well have spent

21 J. Llarena, *Organización graduada*, «El Magisterio Balear», n. 21, 1903, p. 182.

22 F. Comas Rubí, *Reforma urbanística i renovació pedagògica en la Mallorca d'inicis del segle XX*, «Educació i Cultura. Revista Mallorquina de Pedagogia», n. 11, 2002, pp. 31-41; F. Comas Rubí, *L'escola Graduada de Palma. Cent anys aprenent (1912-2012)*, Palma de Mallorca, Lleonard Muntaner Editor, 2012.

23 Comas, *Posibilidad de dar en nuestras escuelas la enseñanza enciclopédica y cíclica*, cit., p. 4.

several years implementing the system before publishing the initial results. His experience published in «El Magisterio Balear» represents a hugely valuable source to discover schooling practice from the period. As Comas himself states:

> I propose demonstrating the possibility of providing encyclopaedic and cyclical education in our schools, not through reasons but through facts, in order to further oblige non-believers, since reasons can be contested by others, whereas it is difficult to deny the facts […] These are the facts: in yesterday's exam, my pupils demonstrated that despite having implemented encyclopaedic learning, none of the regulatory subjects was overlooked, and by teaching cyclically, there is no confusion between the sections; indeed, quite the opposite, this helps enormously both my own work and that of my pupils[24].

This distinguished teacher also wrote the first texts so as to be able to apply the cyclical system at his school, producing the corresponding books in three levels (those for the first and second grade were published, although the third remained in manuscript form and, due to financial troubles, was never published) and demonstrated, at the very least, that it was possible to apply cyclical learning at all schools and attain true comprehensive education. In parallel, as mentioned earlier, another teacher was also experimenting with grade separation and applying the cyclical method in his schooling: Miquel Porcel i Riera, director of the teacher training school annex at the Normal Boy's School in the Balearic Islands. Porcel published his first work on this topic in 1895, a year after Comas, although he had likely spent several years putting his grade system into practice. For different reasons, Porcel attained wider distribution than Comas. In fact, his famous collection of books called *Grades* would be known not only around the islands but also in the rest of Spain and even in Latin America[25]. Porcel divided his school into four grades (preparatory, elementary, middle and higher) each comprising two school years, except the higher grade that only lasted for one year. The programmes for each grade contained all subjects, with only the intensity and depth of the different topics changing as per the level. The implementation of this system not only represented a major methodological overhaul – involving the adaptation of content and explanations, as well as suitably adapting the exercises – but also a radical change in how education was organised.

A further revealing aspect to the practice of teachers can also be traced through «El Magisterio Balear»: school material. Some ancillary material for teaching started to appear and be debated in the pages of the journal under the prism of new pedagogy. One of the most interesting examples, thanks to it being a pioneering experience in producing intuitive learning material, was the famous *Didascosmos* created by Minorcan teacher Joan Benejam (1846-

[24] *Ibid*., p. 4.
[25] Porcel Riera, *Curso completo de enseñanza primaria con arreglo al método cíclico*, cit.

1922)[26]. This Balearic teacher was one of the most prolific contributors in terms of reflecting on methodological innovation. Proof of the impact of his articles can be seen in the many replies received by the journal from other teachers thanking him for his contributions and congratulating him on their quality. In the aim of replacing books as the sole teaching material for geography, Benejam created an ingenious device to intuitively teach children about geographical features. He created a board that showed the irregular features of the earth's surface in *papier mâché*, sketching out mountains, rivers, crop fields, tunnels, cities, etc. The aim, according an anonymous article about it, was to

> […] partly replace dry and, at times, objectionable learning from books with an object that vividly caught the attention and whose details could be thoroughly assimilated by the mind; this object awakened all the senses, supplying a treasure trove of knowledge and providing teachers, every step of the way, with motivation for fun object lessons[27].

Alongside the presentation of materials, there were also teaching techniques and methods put forward by teachers themselves and countered by practice. These are mostly published in a new section of the journal that premiered in 1901 under the title *Ocurrencias Pedagógicas* (pedagogical considerations). The main aim of this highly interesting section would be for it to serve as an arena to distribute essentially practical content, experiences, trials and ideas from real everyday practice described by the authors themselves: teachers. The then editor of the journal, the teacher Jerónimo Castaño, explained in the first edition of the section:

> We understand that one of the things to most contribute to making progress in education in general and to obtaining good results from primary education would be for all teachers to take note of any considerations, if they can be called that, which their talent draws out in the practice of teaching[28].

The main aim was to collect everyday techniques or procedures that formed part of daily teaching and which provided positive outcomes. For Jerónimo Castaño, there was no doubt that «we are well aware that we all have special ways to teach the many topics on our school syllabi, something we each apply suitably and which always provides a good outcome»[29]. In the words of the distinguished teacher Rufino Carpena – a unique individual influenced by Regenerationist ideas, the Institución Libre de Enseñanza and the educational

[26] I. Vilafranca Manguan, *Mestre Joan Benejam Vives: antologia d'un compromís pedagògic*, Mahón, Institut Menorquí d'Estudis, 2002; X. Motilla Salas, *Mestre Joan Benejam i Vives: 1846-1922*, «Revista de Menorca», n. 87, 2006, pp. 141-147; A.J. Colom Canyelles, *Les idees pedagògiques de Joan Benejam a través dels seus escrits «mallorquins» (segle XIX)*, «Revista de Menorca», 1996, pp. 29-42.

[27] Anonymous, *El Didascomos*, «El Magisterio Balear», n. 40, 1893, p. 4.

[28] J. Castaño, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 10, 1901, p. 88.

[29] *Ibid*., p. 88.

innovations from the start of the century[30] –, «every teacher has and practices something special at their school; something that easily and satisfactorily resolves cases and issues that for others are difficult or which they find overwhelming»[31]. These considerations are like «little sparks overlooked in the heart of schools» or «sparks of genius that ignite from time to time»[32] in daily instruction and teaching and, according to the supporter of this idea, were ripe for distribution to progressively improve schooling.

The idea of an essentially practical pedagogy section in all professional primary education journals underscored the proposal from the then editor of the journal. He believed there was an abundance of material for it to work and encouraged all primary teachers in the Balearics to describe or explain in the form of a lesson all the «extremely special procedures» that led to positive outcomes:

> In this way, we will learn new things, apply them at our schools and be highly satisfied with the sure results we will see in the future thanks to the influx of inspiration from even the most modest of our fellow teachers. Who would doubt the simplest method shown to possibly be a seed that after germinating, growing and developing becomes a robust, leafy tree?[33]

The original idea of this teacher was to initially get these experiences as «loose ideas» to the journal to then move onto a level of «correlation between them» and one day, perhaps, to be able to create a network of interlinked and interrelated ideas so that teachers could have a broad catalogue of techniques to use. For Rufino Carpena, they are

> […] those little scattered lights it would be useful to collect for ease of use and satisfaction of teachers and for the good of learning […] with the result that we could form a torch to guide us through the shadows (of which there are) of regenerative popular learning and education[34].

In this way, the pages of the journal began to collect these different pedagogical considerations that came out of teachers' everyday practice. The first consideration was proposed by Rufino Carpena himself: the so-called «bindividual» reading exercise. The first thing that draws our attention is the teacher's coining of a special term for the proposed system. This practice was

[30] B. Sureda Garcia, S. González Gómez, *Discurso pedagógico y defensa del magisterio en Rufino Carpena Montesinos*, «História da Educação», vol. 21, n. 51, 2017, pp. 229-251; B. Sureda Garcia, S. González Gómez, *«Educacionista», una publicación escolar pionera (1912-13)*, in Hernández Díaz (ed.), *La prensa de los escolares y estudiantes: su contribución al patrimonio histórico educativo*, Salamanca, Ediciones Universidad de Salamanca, 2015, pp. 221-231.

[31] R. Carpena, Ocurrencias pedagógicas, «El Magisterio Balear», n. 15, 1901, p. 142.

[32] J. Castaño, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 10, 1901, p. 88.

[33] *Ibid*.

[34] R. Carpena, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 15, 1901, p. 142.

fairly common in several submissions by teachers in the early years of the 20th century who were inclined to invent their own terminology, likely as a way to differentiate and show innovation in their proposals. The technique was focused on resolving the problem of large class sizes – an aspect that often prohibited involving all pupils in the exercises proposed by the teacher. Readers were to assume a school instructing 40 children. The teacher would initially request the most advanced student read several pages of a book out loud and after this, the same child would listen and direct the reading of another. Meanwhile, the teacher would make another pupil read or monitor and examine what the others were doing. After the second child finished reading, both would then supervise the reading of a further two; when these finished, there would be four students able to supervise the reading of a further four, becoming eight able to supervise a further eight, and so on. Following this technique, and regardless of the class size in a school, the teacher (who stated he did not learn this from another colleague) would ensure that in a short time all children got to practise their reading and, in addition, «he who watches and supervises also reads and learns something»[35]. Despite the suitability of the proposed method for the teacher, he suggested that from time to time the system be paused to make children read by sections, explaining what had been read.

Dictation was also proposed by the same teacher, who suggested a vertical line be drawn leaving a blank margin of about a third of the page in the children's notebooks. This margin would be used for conventional signs similar to those used to correct page proofs after the dictation, stating the errors made in it. Once the corrections were indicated, the notebooks would be returned to pupils who would correct their errors by writing the incorrect words they spot themselves in the space in the margin, following the signs placed by the teacher, assistant or pupil corrector on the corresponding line. For Carpena, this technique was based on the procedure whereby «he who corrects himself, learns». Our attention is drawn again to the fact that this was learnt not in the Normal School but rather from teaching practice which he states faces «the daily aim of overcoming children's problems and obstacles that are often in opposition to pedagogical theories and ideals»[36].

Another interesting proposal by Carpena appears in issue 51 (1901) of «El Magisterio Balear». It puts forward a class procedure to teach children the sense and meaning of a secret vote, taking advantage of an election being run in the town over the previous days. To do this, the teacher placed a glass urn in the school, which quickly caught the attention of the pupils who began to ask: «Teacher, what is this? What is it for? And what is voting?», questions that the teacher gradually answered. Each child had to secretly choose the candidate to vote for, either because they simply liked them or in accordance to whether they

35 *Ibid.*
36 *Ibid.*

believed he could do a better job. With the results of the vote, the procedure was repeated to elect a student who would act as the supervisor and be known as the rules inspector. Carpena listed the voting results, stating in turn that the process had been performed «after notification of the rules to ensure no coercion and after presentation of the candidates (the names of the three or four youngsters who usually help in the teacher to keep order and teach)»[37]:

Piña: 9 votes; Mateo: 5 votes; Picó: 2 votes. Piña was proclaimed as the candidate and named rules inspector – a position usually held for several weeks. His classmates would respect and obey him and he would strive to maintain their support. However, the position revolved from time to time and during these weeks of school work, he would have to follow the lead of another youngster, to whom he would show respect and also recognise certain representative authority[38].

The teacher explained in the following lines that the ballots were burnt after the count to demonstrate to the youngsters that elections should always be secret and it was up to the voters to seek out the candidates, not the other way around. Through this completely practical exercise, Carpena taught his pupils a process that they would have to perform in their future adult lives. It is an example of Dewey's learning-by-doing theory based on learning about the real world through direct application and practice of the theory.

Rufino Carpena is one of the teachers who submitted the most texts for this new section. As we have seen, he would explain different techniques, methodologies and procedures in a clear attempt to pass on his own practical experiences in the classroom to other colleagues. In issue 29 (1901) of the journal, he set out a series of examples of conversations between teacher and pupil that aimed to be a guide to correct unsuitable behaviour amongst children, both at home and at school. One of these referred to the normal habit of children writing on walls for fun, as a «poor-taste game that can even be seen amongst certain adults with limited education»[39]. When catching *in fraganti* a new pupil at the school doing this, Carpena explained how he tried to correct it. In front of his classmates, he dirtied the cheeks of the child with the same charcoal he had used to write on the wall and asked the other children questions such as: What do you think? Does he look good or ugly? Who has dirtied this boy? Who should clean him up? This procedure was an attempt to make the boys understand that it was not the right thing to do and he who had done it should clean it up. Nonetheless, he warns at the end of the text:

The practice of correcting this procedure in similar cases is not advisable for new teachers or for those who have not gained the trust of families and authority over the children. Used appropriately and in moderation, it shows results and has lasting impact on the

[37] R. Carpena, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 51, 1901, p. 481.
[38] *Ibid*.
[39] R. Carpena, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 29, 1901, p. 272.

child, educating him, disciplining him and those who see and hear the warnings from such exemplary education[40].

In the same issue, the teacher Antonio Busquets Arbona put forward a technique that intended to improve the scant practical results obtained by pupils in numeracy taught at school. In response to complaints from parents regarding their children's lack of ability after several years at the school, the teacher decided to «break away from the time and work distribution tables done and to be done, and dedicate three quarters of an hour every day to solving problems in workbooks. After correcting and explaining them, each child would note them down in their own school book»[41]. After the work and writing in the school books, children would take them home and build up a small practical library for numeracy that they could always consult. The teacher proposed the work on the blackboard for those who did not have workbooks and for higher level classes, as they finished their problems, some pupils would help the teacher to draft problems for lower level classes the next day, whilst others would help «make the youngest pupils reason»[42]. In this way, Busquets believed he firstly achieved a review of what had been learnt and, secondly, that pupils acquired new knowledge in writing problems. Lastly, they became familiar with common uses from daily life.

Other teachers used this section not to present an explanation of specific teaching methods or procedures, but rather to demonstrate what they called civic and moral education systems. One example of this comes from J. Banús. This teacher reported a frequent situation of rivalry and hatred between boys from different, nearby towns, different neighbourhoods in a town and even different streets in the same area who came together at nearby schools. For this professional, the possible reasons for this dislike amongst the boys were due to three essential elements: 1) their lack of a wider perspective given their young age, 2) the poor examples set by adults, and 3) the lack of contact between children from different towns. Despite believing that schools could not do everything in this sense if no support was received from authorities and, especially, from parents, Banús proposed his own «consideration» to encourage a moral sense amongst the boys and high esteem amongst peers, as well as providing cross-cutting support for aspects linked to physical and intellectual education:

> It comprises proposing that just as some schools normally go on outings, walks or picnics separately, they should all do it together from time to time, however many the better, to the point that boys from different schools meet and get to know one another. In this way, they would connect, make new friends, strengthen those bonds they already have and a sense of friendliness would be established that would soon spread to other children, i.e. those that do not go to school. Thus, when a boy went to a town or nearby neighbourhood, they would

40 *Ibid*.
41 A. Busquets, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 29, 1901, p. 272.
42 *Ibid*.

be seen as a peer and not as a stranger, which is what often sadly and tiresomely happens today[43].

Another innovative resource that appears on several occasions in this new section is school outings. Indeed, the first articles on field trips and school tours were published in the 1890s, there were not huge numbers of articles about this topic over the following two decades, although they were representative pieces on the interest in this type of school activity, a demand for them to be legally established and defences of their health and pedagogical advantages. There are texts that set out specific experiences both in the Balearic Islands and in other provinces, as well as overseas. Specifically in the Balearics, special attention was given to the school outing to Bellver Woods in Palma organised by the provincial council in 1897. The aim was to bring together over 1,500 pupils from public and private schools in Palma on a well-planned school trip that would serve as a pedagogical model for this type of school practice. The walk – the first of its kind in Palma – took place on 14th October 1897, with processions around the city holding flags and singing songs especially composed for the occasion. The council paid for snacks and, in thanks, the flags were handed to the council after the walk[44].

Returning our focus to the pedagogical considerations section, Melchor Serra – a teacher at a school in Palma's La Vileta neighbourhood – also offered his own contribution. He wrote about his experience over two years with this type of outing initiative, seeing it as «not only as a real joy and delight for the children, but also for the teacher, who saw his pupils use – in practice – the foundations of theoretical knowledge they had been taught»[45]. In his practice, the teacher went even further by linking it to pupils then having to write a composition about it. In this sense, he intended for the children to develop their writing skills and express the emotions they had experienced, as well as describe what they had seen and done. As an incentive for the composition, he proposed awarding a certain number of prizes to the best texts. The compositions from two pupils – Antonio Salleras and Jaime Sabater – are presented as examples in issue 21 (1901) of the journal.

School camps are another topic about which teachers describe their practical experience. Run for the first time in Spain in 1887 thanks to the National Pedagogy Museum initiative, they are a further example of institutional practice introduced to Majorca through the work of Miquel Porcel i Riera. The first camps were subsidised by the provincial council and ran in the Port of Sóller in the summers of 1893 and 1894, with Porcel being responsible for their organisation and management. «El Magisterio Balear» wrote about this and in July 1893 announced the intention to extend them to the schools in Palma

[43] J. Banús, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 20, 1901, p. 187.
[44] Anonymous, *Excursión escolar*, «El Magisterio Balear», n. 40, 1890, pp. 4-5.
[45] M. Serra, *Ocurrencias pedagógicas*, «El Magisterio Balear», n. 21, 1901, p. 195.

for the benefit «of the most needy, sick and weakest children»[46]. A detailed description of how the camp worked was published in later editions, based on the diaries of the pupils themselves. This represents a huge source of interest for historians[47]. The children described their daily routines, including walks around the port and outlying areas, lessons in the classroom, reading, games, lunch breaks and outings. Joaquín Bernard i Porcel described how one evening, after dinner and reading letters, bedtime arrived but a group of children became mesmerised alongside Porcel at the stargazing vantage point:

> Mr. Miguel focused on several stars in the spyglass, giving their name and position. He showed us there were single, binary and triple stars that twinkled like a single one and in different colours. The second of the Great Bear is a binary. The Dog Star is triple but we couldn't see it. […] I would never get tired of looking and learning, and although it was very late, the conversation turned to the formation of the earth[48].

The camp and its benefits are shown on several occasions in the journal. In September 1893, the provincial section dedicated two full pages to presenting it to readers. The section stated:

> Surely some of our local readers, on seeing a group of strange boys in a town, walking around the streets, gardens and olive groves led by a teacher, and seeing exemplary behaviour and discipline, will have asked themselves the following question: Who are these boys and why are they wandering around? […] They are children from poor families at several public schools in Palma under the supervision of Mr Miguel Porcel […] and are part of a School Camp[49].

This article has presented some illustrating examples of cases under study. We have seen several of the formats with which teachers made contributions to educational publications in the period with articles describing their real experiences and opinions, based on their practice, regarding different issues of pedagogical interest at the time: techniques, materials, ways to organise schooling, activities, etc.

By way of conclusion

The educational press is part of a selection of research resources often used by education historians due to their huge potential in studying pedagogical approaches, the introduction of new ideas, new methods, etc. Nevertheless,

46 Anonymous, *Colonia Escolar Mallorquina*, «El Magisterio Balear», n. 30, 1893, p. 6.
47 J. Bernard Pujol, *Colonia escolar del Puerto de Soller*, «El Magisterio Balear», n. 33, 1893, p. 5.
48 *Ibid*.
49 Anonymous, *La colonia escolar de Santa Catalina del Puerto*, «El Magisterio Balear», n. 36, 1893, p. 7.

scant attention has been paid until now to descriptions of specific, everyday schooling practices that teachers themselves describe in this type of publication, always based on real experiences. It is true that these teacher contributions in educational publications from the time, narrating their own practical experiences, do not represent the largest amount of content to be found in these types of publications. Theoretical lectures are greater in number, for example. Nonetheless, as we have shown in this article, it is possible to trace several examples of daily ordinary practice that enable researchers to go beyond theoretical or legislative discourse.

The reflections made by teachers in «El Magisterio Balear», showcasing different methods and with different emphases, refer to life at school as it developed, the essence of teaching practice, direct experience of teaching and, in the end, were used as innovative approaches to practical-based thinking about pedagogy. The description of techniques, methods and materials, or the reasoned explanation of new ways to organise schooling enable us, as researchers, to gain entry to school spaces by way of a virtual breakthrough into classrooms to discover, in the teachers' own words and from a different perspective, what actually went on in these classrooms. This is why we began this study by taking publications as a type of «sounding board» through which it is possible to amplify the echo of teaching experience. As we have seen with the specific example of «El Magisterio Balear» they can be a tool to enable us to see other ways of thinking and debating, other ways of being, doing and constructing schooling, whilst also showing us different approaches to professional teaching practice.

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School photographs: studying the history of a school institution and educational practices based on images*

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ABSTRACT: Studies of school photographs open up multiple analysis opportunities. The goal of this paper is to present the study carried out at Escola Polivalente located in Osório, Brazil, based on the images available in its photographic records. There are over one thousand photographs in total, but this study focuses on a group of 767, taken between 1970 and 1990. To understand the history of the institution and its educational practices, it was necessary to peruse the entire photographic records. Therefore, the collection was categorised and organised in line with certain theoretical and methodological references, which we shall reflect on.

EET/TEE KEYWORDS: School photographs; School institutions; Educational practices; Brazil; XXth Century.

Introduction

This study refers to the photographic records of the Escola Maria Teresa Vilanova Castilhos – Escola Polivalente, located in the city of Osório, a municipality on the north coast of the state of Rio Grande do Sul, in southern Brazil. The institution was founded on 14 November 1974, as part of the

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network of «polyvalent» schools, created in the scope of agreements between the Ministry of Education and the US Agency for International Development (USAID), during the Brazilian Civil-Military Dictatorship of 1964-1985[1]. Some studies have focused on the creation of this network of schools. We highlight the study by Resende and Gonçalves Neto[2], according to whom the creation of this network was part of the educational reform established by Law n. 5.692/71[3], which reformulated primary and secondary education[4]. To implement this network, the USAID hired four specialists, who acted as consultants for two years, alongside four Brazilian educators. This was the team in charge of implementing the measures outlined in the agreement, which was set up as the national EPEM (Secondary Education Planning Team)[5], consisting of eight members. Their aim was to assist the states in implanting the local EPEMs, which would be subordinated to the national EPEM. The network mainly focused on the states of Rio Grande do Sul, Minas Gerais, Espírito Santo, Bahia and Pernambuco. Pessanha and Silva[6], in their study on school culture, believed that this culture was not built around knowledge, but around the possibility of creating an institution deeply associated to a political project and the notion of progress. Therefore, the network of «polyvalent» schools was to serve two purposes: to provide assistance, by giving rudimentary education to the poorest segments of the population; and at the same time to satisfy the demands of the market, in particular the industrial sector.

As such, the network was clearly characterised by the inclusion of technical subjects on the syllabus (industrial techniques, commercial techniques, agricultural techniques and domestic techniques), which intended to provide assistance, and at the same time, train a labour force to satisfy the demands of the market. The allocation of resources to build this network of schools can be clearly seen in the physical structure of the institution, which was furnished with

[1] During the Civil Military Dictatorship, education in Brazil gained a technical propensity, which also derived from the agreements with the USAID.

[2] L.A.V. Resende, W. Gonçalves Neto, *Os colégios polivalentes em Minas Gerais: a experiência da escola estadual Guiomar de Freitas Costa (Uberlândia, 1971-1980)*, «Revista de Educação Pública», [S.l.], vol. 22, n. 48, jun. 2013, pp. 127-145.

[3] It is also pointed out that the decree changed the first National Educational Bases and Guidelines Law n. 4.024, of 20th December 1961.

[4] The network of «polyvalent» schools was attended by children from 11 to 14 years of age, and the education took over from the former *ginásio* [gymnasium], which was encompassed into primary education, from Law n. 5.692/71.

[5] These names cause a certain amount of confusion in Brazil, given that from the National Educational Bases and Guidelines Law n. 9.394 of 20th December 1996, secondary education began to be called Middle Education. In the period under analysis, the education initially called middle education referred to the gymnasium education.

[6] E. Pessanha, F.C.T. Silva, *O lugar de uma escola no tempo de uma cidade: Campo Grande e a Escola Estadual Maria Constança Barros Machado*, in E. Pessanha, D. Gatti Jr. (edd.), *Tempo de cidade, lugar de escola: história, ensino e cultura escola em «escolas exemplares»*, Uberlândia, EDUFU, 2012.

large conventional classrooms, as well as specific classrooms for each technical subject, a library, and a large external structure, with a football pitch, concrete and sand sports courts, a running track and a long-jump track. This physical structure enables one to understand that the Polyvalent Schools were created to fit the propaganda of the military regime, and as stated by Souza and Lima[7], to assist the early entry of young people into the labour market. Meanwhile, its broad and organised structure, as well as the circulation of teachers, served to keep the students in school and in school life.

Considering that this study uses school photographs as the source of its research, it is necessary to reflect on their historicity as documents. Hence, we consider the statements by Le Goff relevant:

> A document is not something that is owned by the past; it is a product of the society that produced it according to the relations of forces that held power at the time. Only by analysing the document as a monument can the collective memory be recovered, and can the historian use it scientifically, i.e. fully aware of what is at stake[8].

Such a reflection is essential to understand the intentionality conveyed in each document that becomes a legacy for later generations. Regardless of whether we are talking about a written or iconographic source, all human production carries an aim, an interest, which is present from its inception, but still remains in its selection. In agreement with Le Goff, Dussel and Priem stated:

> Considering the social-material quality of the image thus also poses the question of the life and death of images, and particularly of why some images (and not others) have survived to reach the present as part of our historical inquiry. If any memory of the past is always threatened by forgetting («each treasure menaced by pillage, each tomb threatened by profanation»), then it is important to reflect on the conditions that made it possible that some images have survived the obstacles and avoided destruction or disappearance[9].

Hence, there is a need to question the conditions that enabled some images to be kept and maintained, in this case the photographs that are part of the historical records of the Escola Polivalente and which have survived until today. As such, a decision was made to present a detailed description of the collection, of its storage conditions and how the photographs were organised by the staff entrusted with this mission. Little reliable information is available about those who carried out these tasks and the organisation criteria, beyond what could be directly gleaned by the researchers.

[7] S. Souza, G. Lima, *Escolas Polivalentes na Ditadura Civil-Militar: Marco no Modelo de Ensino Profissionalizante ou Instrumentos de Propaganda do Regime? O Processo de Implantação do Polivalente de Ituiutaba – MG (1974-1985)*, «Educação & Formação», vol. 1, n. 2, 2016, pp. 72-88.

[8] J. Le Goff, *História e Memória*, Campinas, SP Editora da UNICAMP, 2003, pp. 535-536.

[9] I. Dussel, K. Priem, *The visual in histories of education: a reappraisal*, «Paedagogica Historica», vol. 53, n. 6, 2017, pp. 641-649, cit. on p. 645.

1. *The Collection*

The images that comprise the photographic collection of the Escola Polivalente de Osório are organised in adapted albums, basically in chronological order. The complete collection has over one thousand photographs. However, the decision was made to identify and organise the images produced between 1974 (the year the institution was founded) and 1996 (the year the current National Educational Bases and Guidelines Law was passed). The document *corpus* totalled 767 photographs.

This group of images is laid out in 4 different albums, which have not been properly preserved. These albums are filed on a shelf in the secretary's office of the institution. All the photos were glued onto the pages of the albums. The pages were protected with plastic coverings. It is not known how the albums were organised, so it is not known if they were organised at the same time the photographs were being taken, or if the albums were compiled later on. The latter is believed to be the most likely.

To understand such a large quantity of images, they had to be grouped into broad categories. It is pointed out that to analyse such a large set of documents, it is important to get to know the documents and set them out in order to extract their characteristics and understand how they relate to the history of the institution and the local history. Therefore, the following categories were defined: activity and spaces. The activities are split into formal and non-formal activities and the spaces into general spaces and singular spaces. General spaces are taken to mean those related to the façade, while singular spaces refer to the specific parts of the institution's physical structure.

The first album, which is well preserved: its leather-bound cover is in good condition. The images are laid out beginning with the records of the school inauguration in 1974 (24 photos). This is followed by photographs produced in 1975, most of which portray the cultural presentations by the students and the physical premises of the school. In 1976, the topics broadened out, especially in relation to the 19 photographs of the civic parade of 7 September[10]. In this sense, it is understood that the photographs from the 1970s are clearly records of non-formal activities (civic parades and the school inauguration) and the spaces, such as the physical premises of the school and the organisation of the vegetable plots – a working space for the agricultural techniques subject.

The first album also contains photographs taken up to the year of 1985. In the topic of non-formal activities there are 14 photographs portraying the institution's 10th anniversary celebration. In 1981, we find the first record of the reading club (18 photos), a formal activity that is frequently repeated in the following years and which accounts for a significant number of the photographs in the collection. The last photos of this album depict the civic commemoration

[10] This is the commemoration of Brazil's independence.

parades in the Osório city centre, in 1985, with 10 images of the civic parade of 7th September and 13 photos of the parade commemorating the Farroupilha Week[11]. It is pointed out that the first album pertains to the institution's period of activity during the Military Regime.

The second album of the collection has no front cover, only a back cover. The material is similar to the first album. The photographs were taken between 1986 and 1989. Therefore, from the second album onwards the photographs were produced in the democratic period. The album basically contains photographs of civic commemorations and festivities linked to the school's anniversary. The third album of the collection contains photographs covering the years 1990 to 1994. This album is a catalogue folder of official size, with plastic bags. The album is well preserved. It contains 190 photographs. It starts with photographs of a *mutirão* (charitable event) held in 1990 to renovate the school. As well as being another decade with repeated records of the school's participation in the parades of the Farroupilha week and Brazilian independence, the album is also marked by the institution's 20th anniversary commemorations. The date was commemorated in 1994 and is depicted by the impressive number of 61 photographs. The non-formal activities category has the highest number of images (102 photographs). In relation to the formal activities, the school's reading club is prominent, with 26 photographs covering the years of 1991 and 1993. The fourth album of the collection contains 150 photographs covering the years of 1995 and 1996. The photos are stored in a black folder, like the third album, and this one also does not have a cover. The album, like the previous one, contains photographs of civic parades and school commemorations. Emphasis is given to the commemoration of Black Awareness Week, with 20 photographs. There are again few photographs of formal activities. To exemplify this more clearly, the photograph categories are broken down in the table below:

Tab. 1. Photographs per category and per decade

Decade	Categories		Number of photographs
1970	Activities	Formal	1
		Non-formal	98
	Spaces	General	33
		Singular	18
Total photographs			150

[11] The Farroupilha Week is a regional commemoration that takes place in the state of Rio Grande do Sul, commemorating the Farroupilha Revolution, which took place between 1835 and 1845, during the Brazilian imperial period.

1980	Activities	Formal	23
		Non-formal	245
	Spaces	General	1
		Singular	5
	Neither category		3
Total photographs			277
1990	Activities	Formal	90
		Non-formal	228
	Spaces	General	0
		Singular	22
Total photographs			340

Source: Compiled from the project *História e memória da educação profissional: a Escola Maria Teresa Villanova Castilhos* (History and memory of professional education: Escola Maria Teresa Villanova Castilhos).

One can understand that over the first two decades, although priority was given to the photographs of activities, both formal and non-formal, it was also deemed important to depict the physical spaces of the institution. This is possibly related to the big investment made towards the physical infrastructure of the network of «polyvalent» schools[12]. Therefore, one can understand that, especially in the 1970s, a period when the Military Dictatorship was strongly entrenched, there was an intense representation of these spaces of the institution. One can see, especially in the 1990s, the number of photographs of spaces decreases, especially of external spaces.

In relation to the activities, there is a predominance of non-formal activities. This is related to the fact the non-formal activities depict mostly commemorations and/or festivities, which are generally a theme of representation. As stated by Comas and Sureda[13], institutional images, regardless of the form they take, aim to create a collective identity and develop symbolic relationships that can be shared by those who consider themselves members of this collective, reinforcing the feeling of belonging. According to the authors, the activities portrayed are stereotypical, planned, with the intention of developing a repertoire of specific symbolic items that underpin a specific identifying discourse.

12 For more on this topic, see Souza, Lima, *Escolas Polivalentes na Ditadura Civil-Militar: Marco no Modelo de Ensino Profissionalizante ou Instrumentos de Propaganda do Regime? O Processo de Implantação do Polivalente de Ituiutaba – MG (1974-1985)*, cit.

13 F. Comas Rubí, B. Sureda Garcia, *Album photographique scolaire, histoire et configuration de l'identité des établissements scolaires: le cas du collège Sant Josep Obrer de Palma*, «Encounters in Theory and History of Education», [S.l.], vol. 17, 2016, pp. 119-140.

To show even more clearly the topics presented in the set of photographs, the following tables have been compiled (2, 3 and 4) to outline in more detail what the Photographic Records of the Escola Maria Teresa Villanova Castilhos consists of.

Tab. 2. Catalogue broken down according to the captions (1970s decade)

1970s Decade		Caption	Year	Qnty.
Activities	Non-formal	School inauguration	1974	24
		Cultural Presentation	1975	12
		Civic parade – 7 September	1976	19
		June festivities	1976	4
		Cultural gymkhana	1976	5
		End of Academic Year	1976	4
		Civic parade – 7 September	1977	19
		June festivities	1979	4
		Civic centre of the school	1979	7
	Formal	Science Fair	1977	1
Spaces	General	Physical premises of the school	1975	11
		Physical premises of the school	1978	22
	Singular	Organisation of the vegetable plot and the gardens	1975	12
		Organisation of the vegetable plot and the gardens	1979	6

Source: Drawn up by the authors as part of the project *História e memória da Educação profissional: o caso da Escola Maria Teresa Villanova Castilhos* (History and memory of professional education: the case of the Escola Maria Teresa Villanova Castilhos).

In looking at the captions attributed to the photographs, it is apparent that a very broad range of topics is portrayed, while at the same time you can see that certain topics are repeated. As shown in the table above, the 1970s included a high number of photographs on the inauguration of the institution, an activity that is commonly portrayed in the collections of educational institutions, taking into account what the celebration of the inauguration represents for the understanding of the institution's identity, as well as for the authorities involved in the process of creating the school in question. As mentioned earlier, the Escola Polivalente de Osório is part of a network that resulted from the MEC-USAID agreements, so it is part of a nationwide project. As its foundation involved the regional and local governments, it became relevant for different spheres of power.

The importance of the foundation of the school for these spheres of power in the 1970s is reflected in the high number of photographs of the institution's building. This practice is related to the establishment of an institutional identity, while at the same time the existence of an ample and suitable physical structure

lent weight to the dissemination of the system in place. To this aim, the words of Escolano should be taken into account: «The school architecture is also in itself a programme, a kind of discourse that instigates a system of values in its materiality, such as order, discipline and vigilance»[14]. The author affirms that the educational spaces are endowed with meanings and transmit a significant quantity of stimuli, content and values. Simultaneously, Escolano highlights the imposition of its rules as disciplinary organisations.

As well as the images related to the school's foundation, the photographs were also dedicated to a range of topics such as cultural presentations and cultural gymkhana (respectively 12 and 5 photographs), the June festivities[15] (8 photographs) and the end of the academic year (4 photographs). However, the civic commemorations are the most often portrayed topic, with 38 photographs of the civic parades of 7 September and 7 photographs of the school's civic centre. This can be related to the country's socio-political background at the time, in addition to the fact that such celebrations are commonly held in schools and considered integral elements of the school calendar, even in the democratic periods. It can be seen, however, that during democracy, especially in the first years of re-democratisation, the school practices related to the civic commemorations took on a new guise, most notably with the addition of social criticism. According to Bencostta, «As they are at the core of the school calendar, the parades are not a mere interruption of the school schedule, but are integrated into it, making it necessary to gather the efforts and the feeling of participation of the pupils and the teachers»[16]. The author also adds that: «These parades were very special collective events, which demanded a certain organisation, given that they were planned in accordance with the rules specific to each of the civic dates»[17].

[14] A. Escolano Benito, *Tiempos y Espacios para la Escuela*, Madrid, Editorial Biblioteca Nueva. S.L., 2000, p. 26.

[15] In Brazil, the June festivities are celebrations of the Catholic saints that fall in the month of June, such as Saint John, Saint Peter and Saint Anthony.

[16] M.L.A. Bencostta, *Desfiles patrióticos: memória e cultura cívica dos grupos escolares de Curitiba (1903-1971)*, in D.G. Vidal (ed.), *Grupos escolares: cultura escolar primária e escolarização da infância no Brasil (1893-1971)*, SP, Mercado das Letras, Campinas, 2006, pp. 299-322, cit. on p. 301.

[17] *Ibid*.

Tab. 3. Catalogue broken down according to the captions (1980s decade)

1980s Decade		Caption	Year	Qnty.
Activities	Non-formal	June festivities	1982	21
		Civic parade – 7 September	1982	2
		Civic parade – 7 September	1984	2
		School Anniversary	1984	14
		20 September Parade	1985	10
		Civic parade – 7 September	1985	26
		June festivities	1986	27
		Civic parade – 7 September	1986	22
		20 September Parade	1986	19
		Student Body Dance	1986	4
		School Anniversary	1986	22
		Civic parade – 7 September	1987	10
		20 September Parade	1987	13
		School Anniversary	1987	5
		Flag Day	1987	1
		Teacher Farewell	1987	4
		Civic parade – 7 September	1988	16
		June festivities	1988	3
		Children's Week	1988	3
		Civic parade – 7 September	1989	3
		School Anniversary	1989	18
	Formal	Reading club	1981	18
		Science Fair	1982	2
		Science Fair	1987	2
Spaces	General	Revitalisation of the school	1989	1
	Singular	Organisation of the vegetable plot and the gardens	1980	5
		Not identified	1987	3

Source: Compiled by the authors.

In the 1980s the photographs of the civic parades are constantly present, with the images of the 7th September festivities. They also began to include the 20th September regional festival, which resumed its relevance at the end of the Military Dictatorship and the start of the re-democratisation phase. This can be related to the fact that the authoritarian periods, at least in Brazil, although one could cite other examples, took place as a quest to develop a single national identity, supplanting regionalisms. In relation to the formal educational activities, there was a proliferation of photographs portraying the Reading club and the Theatre group.

Tab. 4. Catalogue broken down according to the captions (1990s decade)

1990s Decade		Caption	Year	Qnty.
Activities	Non-formal	«Mutirão» (charitable event) to refurbish the school	1990	1
		Patriotic week parade	1990	5
		Queen selection dance	1990	7
		Teacher's day lunch	1990	4
		Farroupilha week	1992	5
		Children's week	1992	9
		Patriotic week	1993	6
		20 years of the «poly»	1994	61
		Reading club at the POA reading fair	1994	4
		Patriotic week/parade	1995	12
		School week (21 years old)	1995	17
		Black Awareness event	1995	20
		Christmas	1995	3
		Mother's Day festival	1996	23
		June festivities	1996	9
		Father's Day festival	1996	6
		Patriotic week/parade	1996	14
		Farroupilha week	1996	4
		End of academic year	1995	9
		End of academic year	1996	9
	Formal	Sports activities	1990	5
		Group of pupils	1990	2
		Pupils researching in the library	1990	3
		Theatre group	1990	13
		Reading club in the CCMQ	1990	5
		Management of the reading club	1990	3
		Reading club	1991	16
		Civic gymkhana	1991	14
		Reading club exhibition	1992	1
		Choir	1992	4
		Reading club	1993	10
		Classes	1994	6
		Project author / Jane Tutikian	1994	1
		Project author / Lisa Lima	1995	7
Spaces	General	No records		
	Singular	School garden	1994	5
		School garden	1995	12
		Pupils in the garden	1995	5

Source: Compiled by the authors.

2. *Activities and spaces: possibilities of analysis of the photographic collection*

Souza[18] states that the appearance and dissemination of school photographs is linked to the dissemination of the social value of school in Brazilian society. The school period, as well as the years of schooling, became key moments in the life of the child and the family. Alongside schoolmates, the teacher and sometimes the head, each pupil and the class as a whole symbolised the very social and cultural sense of the school. As mentioned earlier, the object of study here was broken down into categories to enable analysis of the photographic collection. Grosvenor's statements are considered essential:

> Traditionally, historians, when they have worked with photographs, have been generally concerned with extracting evidence about the materiality of the past. This is done by looking at what is made present in an image. Looking, however, always has a subjective quality which shapes the ideas that are formed in dialogue with an image and the meanings that are then constructed. At the same time, as I hope shown here, the particularities of local knowledge can bring additional insights and understandings when confronted with single or multiple images[19].

Aimed at finding evidence and understanding items of school culture, it is highlighted that this study pertains to ongoing research, whereby the aim is to confront and compare the photographs against other kinds of documents and within a broad study of the history of local education.

In the first decades of the 20th century, photographs of school practices were broadly disseminated in the press throughout the country. School institutions gained importance through their representation as a space to disseminate the republican ideology and to train citizens adapted to the new regime. Certain practices were given more publicity, such as the civic commemorations. Others, however, although they took on a secondary role as regards their publicity, were present in the daily school life as an integral part of a disciplinary syllabus.

Decades have gone by and the photographs of school practices continued to be produced, especially with the popularity of cameras that did not need to be operated by professional photographers. Analysis of the photographic collection of the Escola Polivalente de Osório allows one to discern that photographs of school practices or activities were given precedence in relation to photographs of the school building, both the façade and inside it.

A wide range of school activities were portrayed. Among, we have chosen images of topics that were repeatedly addressed. As mentioned earlier, there are fewer photographs of the formal activities than the non-formal activities.

[18] R.F. Souza, *Fotografias escolares: a leitura de imagens na história da escola primária*, «Educar», n. 18, 2001, pp. 75-101.

[19] I. Grosvenor, *The School album: issues, histories and inequalities*, «Educació I Història. Revista d'Historia de l'Educació», n. 15, 2010, pp. 149-64, cit. on p. 154.

Pic. 1. Sports activities (1990), Photographic Records of the Escola Maria Teresa Villanova Castilhos

Pic. 2. Reading club (1993), Photographic Records of the Escola Maria Teresa Villanova Castilhos

Portraying the everyday life, the ordinary, the daily school practice, was not a constant concern among school institutions. Even when an attempt is made to portray the daily school practices, these are carefully chosen to represent the institution and the subjects involved (teachers, pupils, etc.) in their best light. Among the photographs that are part of this group, there is, for example, images of sports activities during the Physical Education lessons, such as in Pic. 1. It is pointed out that this activity is represented from the 1990s onwards. The photographs of the physical education lessons occupied an extremely broad space in the media in the early decades of the 20th century but observing the last decades of the century one realises that they no longer were given the same emphasis. In contrast to the traditional gymnastic lessons, the 1990s is permeated by the practice of certain sports, such as volleyball, as shown in the image. It shows a group of students, of both sexes, probably from the final years of primary education (in the 1990s still called 1st-degree education). The school, in this period, apparently did not use uniform, or at least when the photograph was taken the students were not wearing it. It is relevant that in the 1990s, the school did not have the resources of the aforementioned PREMEM but had

Pic. 3. School inauguration (1974); Photographic Records of the Escola Maria Teresa Villanova Castilhos

been converted into an institution solely linked to the state's education network. However, one can glean that the physical infrastructure was maintained, and that the institution had a sports court (seen through the existence of a basketball basket and volleyball net). The treelined surroundings of the school showed that the immediate vicinity of the school was still sparsely populated.

In contrast to the sports activities, the Reading club started to be portrayed from 1981. Studies on the history of education in Osório say that certain subjects involved the organisation of clubs where the pupils and several teachers interacted, which began to operate in Osório in the wake of the Rural School Mathematics Club, which dates back to the 1970s. It is believed there is also an external influence explained by the proximity to Porto Alegre, the capital of the state of Rio Grande do Sul, and the metropolitan region, where there are a large number of teacher training institutions. It is believed the lessons occurred within the clubs and that different approaches were used to impart the content. In relation to the non-formal activities, these are portrayed more frequently, which may be related to the fact that photographs were commonly used to portray the extraordinary – an event, a ceremony. For example, Pic. 3 shows the school

Pic. 4. Patriotic Week Parade (1986), Photographic Records of the Escola Maria Teresa Villanova Castilhos)

inauguration. It is a very common photograph, in which the authorities cut the inaugural tape of the institution, to mark the start of the activities. The clothing portrays the ceremonial nature of the act, as the authorities, a group made up mainly of men, are wearing a suit and tie, while the children are in school uniform, comprising a white shirt and blue neck tie for the smaller children, and a white shirt for the older ones.

The inauguration photograph also enables us to see that the surroundings of the school included at least one chalet-like house, a simple construction, usually used as a home by low-income families. It is pointed out that the Escola Polivalente, although located in a central zone of Osório, was on the periphery of this neighbourhood, near other neighbourhoods and far from the city's main streets. The oldest school in the city, the Escola Estadual General Osório, is located in a central area and it was the institution that served, for a long time, the children of the Osório elite – such as children of doctors, lawyers and businessmen, several of whom became local politicians.

The Escola Polivalente, in contrast, was created based on an agreement that aimed to supply financially accessible labour for the growing industry, or for the established large rural proprietors, and was directed at the lower classes, which justifies the choice of a more distant area. It is also pointed out that the

size of the institution required a plot of land further away from the centre to enable a large school to be built.

Pic. 4 depicts a non-formal educational activity that was very often portrayed in school collections and even published in the press: the civic commemorations. As mentioned earlier, this practice has been studied by several authors, such as Bencostta[20]. Among the photographs of civic parades and commemorations are images linked to strengthening the existing regime, in which the students organised themselves in an orderly manner. Pic. 4, however, represents the transformations that were taking place from the end of the 1970s, whereby these activities began to be used as a stage for calls for change and social protest[21]. In the photograph below, a truck can be seen with two banners. On the front of the truck, a face with an open mouth in the shape of Brazil is shouting: «Wake up, Brazil». On the top of the truck, another banner says: «Brazil, you don't know what you are missing out on, leaving our children to die without schooling, nationhood, bread, a roof, health or life». According to Martiarena de Oliveira[22], linked to the social movements, especially the strikes by the state teachers, the civic commemorations in the city of Osório no longer were the scene of an invented tradition, and became a stage for social protest in the backdrop of re-democratisation.

In relation to the spaces portrayed, there is an evident concern for the school buildings to comprise a disciplinary tool in the urban layout, resulting from notions of pedagogy and hygiene. As Escolano and Viñao explains[23], the notion of place, the location in a specific space set up for a specific purpose is one of the most characteristic features of the school institution since the middle of the 13th century. According to Escolano[24], the school architecture is in itself a programme, a kind of materialised discourse, that champions a system of values, such as order, discipline and reasoning, which comprise benchmarks for sensory and motor learning and a whole semiology that encompasses different aesthetic, cultural and ideological symbols. At the same time, the format of the educational space reflected the pedagogical innovations, both in its general conceptions and its more technical aspects.

Therefore, the school comprised a sign of modernity, an important reference point in the middle of the urban layout, representing a symbol of reverence for

[20] Bencostta, *Desfiles patrióticos: memória e cultura cívica dos grupos escolares de Curitiba (1903-1971)*, cit.

[21] M.A. Martiarena de Oliveira, *Comemorações cívicas pós-Regime Militar em Osório-RS: da formação moral e cívica ao movimento de reivindicação*, in S. González, J. Meda, X. Motilla, L. Pomante (edd.), *La Práctica Educativa. Historia, Memoria y Patrimonio*, Salamanca, FahrenHouse, 2018, pp. 709-719.

[22] *Ibid*.

[23] A. Escolano Benito, A. Viñao Frago, *Currículo, espaço e subjetividade: a arquitetura como programa*, 2 ed., Rio de Janeiro, DP&, 2001.

[24] Escolano Benito, *Tiempos y Espacios para la Escuela*, cit.

Pic. 5. Car park (1975), Photographic Records of the Escola Maria Teresa Villanova Castilhos)

the populations that observe it. Escolano[25] dedicated himself to researching a network of meanings present in the educational spaces, which transmit a significant number of stimuli, content and values, at the same time as imposing its rules as disciplinary organisations. Not only the «school space», but also its location and its layout in the urban mesh, should be analysed as a curricular aspect.

The collection of the institution has fewer photographs of spaces than activities. Nevertheless, in the 1970s there was a concern to show the investment in the infrastructure of the institution, which can be seen, for example, in Pic. 5, with the construction of a car park for the school. It is pointed out that in the region, even today, few schools of the state educational network have car parking for their teachers. The photograph of the car park, with just one car parked, shows that the site chosen was near the zone used for the civic commemorations, as the poles can be seen in the background. The sports court can also be seen nearby.

[25] *Ibid.*

Pic. 6. Experimental field (1979), Photographic Records of the Escola Maria Teresa Villanova Castilhos

Pic. 6 shows the experimental field, which was located in the vegetable plot. This topic was widely portrayed, which suggests the agricultural techniques had a prominent position in the technical disciplines provided by the institution. The study carried out by Martiarena de Oliveira in 2018 about the «Revista Polivisão» magazine, which was published by the teachers of the School, contained specific material about the technical agricultural teaching, written by Prof. Sebastião Fich da Rosa, who was in charge of this area and who was the Head of the institution for several years[26]. The vegetable plot was used as space for experimentation, a laboratory for learning agricultural techniques.

Final considerations

[26] M.A. Martiarena de Oliveira, *Revista Polivisão: a imprensa pedagógica em uma escola polivalente*, in J.M. Hernández Diaz (ed.), *La prensa pedagógica de los profesores*, Salamanca, Ediciones Universidad de Salamanca, 2018, pp. 215-228.

The photographic collection of the Escola Polivalente de Osório covers a wide range of topics, which makes it an important set of documents to study the History of Education in the decades from 1970 to 1990. Based on this collection, one can reflect on several aspects of school culture, and also delve into the history of a school institution that was part of the national network. Based on the collection, topics can be studied such as: school subjects, the role of the technical subjects, school spaces, technical education.

The amplitude of the collection is probably related to the availability of portable cameras, which occurred in the last decades of the 20th century. In studying the collection, it is noticeable that the number of photographs produced increases every decade, until diminishing upon the advent of the digital photograph (which took place only after the time period selected for this study). Analysis of the collection shows how the ceremonial photograph (civic commemorations, festivities) remain among the foremost topics, even without the need for a professional photographer. It is understandable that photographs of events generated greater interest than photographs of everyday life. Another research possibility is to look at the selection of photographs, given that, as Le Goff states, the document is what arrives to us from the past, after numerous selections carried out by previous generations. Hence, thinking about how the School albums were compiled and organised leads us to conclude that the photographs were chosen according to the criteria of those in charge of their storage.

As mentioned earlier, most of the photographs in the school's collection refer to the non-formal activities. This category, taking into account its amplitude and the diversity of topics tackled, usually accounts for the lion's share of the images in school photographic collections. In the 1970s, there was a high number of photographs depicting the school inauguration, which is in line with how the photographic collections of educational institutions were compiled throughout the 20th century. Also, to be taken into account is the political role that the network of «polyvalent» schools played for the military government, as well as for the state and municipal governments. As mentioned earlier, resources from these different spheres, as well as the US Agency for International Development (USAID) were used for the implantation of the network of «polyvalent» schools. Therefore, the inauguration of the institution in Osório was representative for the federal government, albeit on a smaller scale, as it was part of a network created during the government and for the state and municipal governments. Its importance is understood by the presence of authorities, and the significant act of cutting the tape.

As well as the images that portray the inauguration, among the topics tackled are the commemorations, especially the civic commemorations. It should be noted that this is one of the most repeated photography subjects. In the 1970s, of the 109 photographs of activities, 86 are non-formal activities, and of these, 38 are photographs of civic parades (7th September and 20th September). In the

1980s, of the 277 photographs of activities, 245 are non-formal activities, and of these, 123 are civic parades. The 1990s marks the decadence of this kind of photograph, given that out of the 340 photographs of activities, 210 are non-formal and of these only 31 portray civic parades.

This topic was tackled in a paper entitled *Comemorações cívicas pós-Regime Militar em Osório-RS: da formação moral e cívica ao movimento de reivindicação* [Post-Military Regime civic commemorations in Osório-RS: from moral and civic training to the movement of making demands][27]. The aim was to understand what had changed and what had remained the same in the civic festivities. By analysing the photographs of the School's collection together with news articles and photographs from the local press, the study suggests that the civic commemorations are «invented traditions», in line with Hobsbawm's concept[28]. Their relatively recent origin and their frequent use by the State justify this claim.

However, the documents researched indicate that, from the end of the 1970s and especially during the decades of the 80s and 90s, this space of state control underwent a series of transformations. The studies say that one cannot talk about a complete rupture, in view of how such practices are carried out in Osório, which show continuity. Meanwhile, the research points out that the teaching body from the Rio Grande do Sul region was involved in a series of social movements that gave new meanings to the practices, particularly in certain schools. Therefore, the study demonstrated the newly attributed meaning of an event that had previously aimed to inculcate certain values, but which was now an activity of social protest. This stage for protest was used in the 1990s, as cited in the previous section, to defend the maintenance of the technical subjects.

Among the photographs of the formal activities, there are very few classroom images. In general, the activities linked to the Reading club, Theatre group and physical activities are the most recurrent themes. As for the images of the spaces, these kinds of photographs were most prolifically produced in the 1970s, when the images of the school inauguration and photographs portraying parts of the interior and exterior of the institution were linked to the political dissemination regarding the implementation of the network of «polyvalent» schools. Considering that many resources from different spheres had been invested, there was a very clear need to show how such expenditure had been applied. It is pointed out that, nationally, the schools that were part of the «polyvalent» network stood out because of their large physical buildings, the number of laboratories used for the technical subjects and how they were

[27] M.A. Martiarena de Oliveira, *Comemorações cívicas pós-Regime Militar em Osório-RS: da formação moral e cívica ao movimento de reivindicação*, in González, Meda, Motilla, Pomante (edd.), *La Práctica Educativa. Historia, Memoria y Patrimonio*, cit., pp. 709-719.

[28] E.J. Hobsbawm, T. Ranger (edd.), *A invenção das tradições*, 10 ed., São Paulo, Paz e Terra, 2015.

up-to-date and complete to meet the educational needs of the pupils. In the 1980s, the photography topic was dropped. Meanwhile, in the 1990s there are photographs of the inside of the building, especially the gardens. The uses given to the facilities, however, were very different from those proposed in the 1970s. The indoor spaces are presented as socialising areas, or portray how the institution, which no longer had the same political utility, took care of its premises.

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The Filmstrip. History and evolution of an educational tool

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ABSTRACT: Forgotten in the history of Modern Education, the filmstrip is reborn at the beginning of the 20s as an ideological tool for both Catholic and secular schools (as well as being an educational device). From the 30s to the 60s, it has been one of the most used educational tools in France: teaching device since the arrival of the slides in the 60s and the computer in the 80s, the filmstrip's history – by its confined chronological limits – offers a possible study of such a didactic object. It is also a way of participating in the construction of the history of education. Our contribution seeks to highlight the characteristics of the filmstrip and its use as an indicator of evolving educational practices.

EET/TEE KEYWORDS: History of education; Filmstrip; Educational tools; Educational practices; France; XXth Century.

Introduction

Heritage object since the arrival of slides in the 60s and computer science in the 80s, the filmstrip, offers an opportunity to put into perspective many current debates on Education, media and the stakes involved in the introduction of a new pedagogical support in teaching.

In the same way as official school textbooks, with their own characteristics, the filmstrip also makes it possible to focus on a necessary history of pedagogical practices in order to sketch a reflection on what is taught and how it is taught.

Our study centres mostly on the CEDRHE's filmstrips collection (Centre d'Etude, de Documentation et de Recherche en Histoire de l'Education, Université de Montpellier). A collection made up of a large number of films: more than 4.500 published in about twenty publishing houses, and dating back from the 1930s to the end of 1960s. Beyond these characteristics, our research, encompassing various collections of Hérault schools, also carries the ambition

of sampling the various issues faced by the filmstrip in teaching primary and secondary school during these few decades.

In order to understand how the filmstrip is a relevant educational tool in the study of the history of education, it is necessary to offer a reflection around three axes. The first will be a brief reminder of its peculiar history: before being educational, it was first and foremost a burning issue in the ideological conflict between catholic and secular schools.

Then in a second part, we shall analyse the CEDRHE's collection of filmstrips in order to establish a typology.

Finally, in a third part, we will offer an illustration by focusing on a pupil's exercises book (also available at the CEDRHE) in order to raise the question of how the filmstrips were used in classrooms.

1. *A peculiar history: an ideological and educational issue*

While sharing a common history with educational cinema, the filmstrip has an interesting evolution: at the very beginning, it had been an ideological issue between catholics and seculars before it became an educational issue within schools.

The history of still film is linked to that of cinema. However, the use of still images has been educational when cinema has been entertaining.

1.1 *Animated movies and filmstrips: a common origin?*

The filmstrip's origins seems to blend with those of animated educational cinema. Before World War I, only a few pioneers were interested in introducing film into teaching. Producer and director Jean Benoît Levy (1888-1959) offers as of 1909 «the application of cinema to education»[1] by intervening in the congresses of the League for Education and School Mutualities to encourage primary school teachers to adopt this «new educative tool»[2].

At the same time, the first political wills clearly emerge at the end of World War I with the creation of an extra-parliamentary commission that was «asked to seek the best ways of generalizing the use of films in various branches of education». The committee's report highlights the need for increased control

[1] G.-M. Coissac, *Le cinématographe et l'enseignement: nouveau guide pratique approuvé et adopté par le ministère de l'instruction publique*, Paris, Larousse-Éditions du cinéopse, 1926.

[2] V. Vignaux, *Jean Benoit-Lévy ou le corps comme utopie. Une histoire du cinéma éducateur dans l'entre-deux-guerres en France*, Paris, AFRHC, 2007.

over film content to prevent it from «corrupting» children, but also declares itself in favour of the use of animated films and filmstrips in education[3].

The 20th November 1921[4], circular from the Ministry of State Education decided on a series of measures and initiatives to develop the use of films in schools. On the one hand, the possibility for the Ministry to obtain payment of one «third» of the expenses for the purchase and installation of films equipment in schools. On the other hand, the Ministry sets up a permanent commission in charge of all matters relating to films: visas, filming, regional cinema centres, submission of films to the School Inspection Centres, administrative regime and control of films, tax exemption for entertainment, list of approved devices, etc.

In 1922, the first National Congress of Educational Cinema, under the aegis of the National Direction of Technical Education, set in motion these governmental plans, developing educational cinema and sending many animated movies and filmstrips to French schools.

1.2 *The result of a technical revolution*

But the development of the filmstrip was also the result of a technical innovation which allowed for a none-expensive broadcasting, as opposed to that of animated movies. Indeed, the Pathé-Cinéma Company launched in 1923 a new device called «Pathé baby», or «home cinema», which replaced the glass view. This technical innovation was soon followed by the creation of a whole series of projectors such as the «Mistral» or the «Provence», marking the interest of private companies in this new market. The Pathé-Cinéma Company underlined what were the filmstrip's advantages according to them:

> The purpose of our company was to make available to everyone, for a reasonable price, a choice of carefully selected views, accompanied by an explanatory text, documented and capable of offering the same services as glass plates', which are more common but also more expensive, and much more delicate to manipulate because of their fragility[5].

Therefore, at the beginning, the filmstrip was quite different from the animated movie (which was also undergoing a revolution with the arrival of the «speaking» motion pictures). The filmstrip allowed teachers to keep the monopoly of speech in relation to the film.

[3] D. Nourrisson Didier, P. Jeunet (dir.), *Cinéma-Ecole: aller-retour*, Saint-Etienne, Presses Universitaires de Saint-Etienne, 2011.

[4] A. Lantenois, *Ce que l'instituteur doit savoir*, Paris, Nathan, 1933.

[5] Catalogue Pathéorama, Fondation Jerôme Seydoux-Pathé, 1926, p. 2, cited on V. Vignaux, *Le film fixe Pathéorama (1921) ou généalogie d'une invention*, «Tréma», vol. 41, 2014, <https://journals.openedition.org/trema/3128> (last access: 07.04.2020).

But if the Ministry of Public Education was in favour of the use of cinema and especially of filmstrips, the latter remained the privilege of catholic schools between the two wars.

1.3 *An ideological issue between catholic and secular education*

The first filmstrips were generally used during Christian ceremonies and catechism. Thousands of these films were published, telling the holy story. They were appreciated by the clergy and missionaries[6], as they left the priest the possibility of commenting and explaining without being contradicted.

These religious filmstrips, whose the CEDRHE owns 600, come from powerful and active publishing houses: for example, the Maison de la Bonne Presse which published many religious filmstrips was also the publishing house of Christian newspapers such as «Le pèlerin» and the daily newspaper «La Croix». By the creation of cinema, in 1895, Georges-Michel Coissac (1868-1946) was commissioned by the religious editorial group to organise a network of projections: first of projections on glass, then of more malleable and handy filmstrips. This broadcasting, directed by the Catholic Cinema Centre, illustrates a parochial framing of the filmstrip and became a model for the Ministry of Public Education, which commissioned Georges-Michel Coissac to draw up a report on this issue in 1926[7].

Catholic circles also create the cinema magazine «Le fascinateur», which was to take a clear stance on the opposition between the influence of Catholics and that of Seculars. This struggle for influence illustrates how the use of image in the learning process became an obvious matter for everyone. The magazine «La revue pédagogique» (which remains a source for public education) insists, as early as 1899, on the importance of images during a series of educational conferences, and stresses the fact that public school teachers must develop this tool for a wider population.

[6] I. Dujonc, *Les films fixes et les missionnaires de l'Ouest de la France*, «Annales de Bretagne et des pays de l'Ouest», n. 2, june 2005, pp. 115-133; C. Bonafoux, *Les catholiques français devant le cinéma entre désir et impuissance. Essai d'une histoire du public catholique*, «Cahiers d'études du religieux. Recherches interdisciplinaires», special issue (online), 2012, Last update: 01.06.2012 <http://journals.openedition.org/cerri/1073> (last access: 05.04.2020).

[7] Coissac, *Le cinématographe et l'enseignement: nouveau guide pratique approuvé et adopté par le ministère de l'instruction publique*, cit.

In 1920, still in «La revue pédagogique», Auguste Bessou, rapporteur of the extra-parliamentary commission in charge of studying the means of generalizing such use of cinema in various branches of teaching[8], underlines the fact that «the cinematographer destroys the effects of ignorance which considers itself wise because it is suspicious and narrow-minded. It initiates the child, from an early age, to the complex mechanism of modern life»[9].

After World War I, a «secular response» is organized, first on the initiative of the League of Education, which creates the magazine «Ciné-scola»[10], then through the creation of the educative cinema services[11], the first of which dates back to 1921. However, it was not until 1933 that the French Union of Services for Educative and School Cinema (Union française des Offices du cinéma scolaire et éducateur – UFOCEL)[12] was founded, which coordinates the different services in a network of teaching, education and propaganda through cinema, towards parish halls.

These services can rely on the quantity of animated movies and filmstrips from the archives of the Educational Museum's Library, which depends on the Ministry of Public Education and Fine Arts. The *Code Soleil*, the «breviary» of public primary school teachers, specifies in its 1926 edition:

> Let us organize sessions of commented readings, conferences and even, if possible, of conferences with animated or filmstrips projections, thanks to the educative cinema, which will become more and more, the most precious populariser of knowledge even in rural districts[13].

Therefore the image, whether animated or fixed, is integrated into teaching. The didactic use of the image is used by the school institution as a powerful vector to develop moral and hygienic propaganda[14].

[8] A. Bessou, *Rapport de la Commission extraparlementaire chargée d'étudier les moyens de généraliser l'application du cinématographe dans les différentes branches de l'enseignement*, Paris, Imprimerie nationale, 1920.

[9] A. Bessou, *l'emploi du cinématographe dans les différentes branches de l'enseignement*, «La revue pédagogique», février 1920, p. 128.

[10] «Ciné schola, bulletin de la ligue pour l'enseignement par la cinématographie», n. 1, november 1922.

[11] P. Laborderie, *Les Offices du cinéma scolaire et éducateur à l'épreuve des publics*, «Conserveries mémorielles», n. 12, 2012. Last update 05.04.2012, <http://journals.openedition.org/cm/1230> (last access: 05.04.2020).

[12] R. Borde, Ch. Perrin, Charles, *Les offices du cinéma éducateur et la survivance du muet (1825-1940)*, Lyon, PUL, 1992.

[13] J. Soleil, *Le livre de les insituteurs*, Paris, Sudel, 1926, p. 123.

[14] T. Lefebvre, *Films fixes et santé publique*, «Revue d'histoire de la pharmacie», vol. 331, 2001, pp. 381-399; D. Nourrisson, J. Freyssinet-Dominjon, *L'école face à l'alcool*, Saint-Etienne, Presses Universitaires de Saint-Etienne (PUSE), 2009.

1.4 *An ongoing evolution paved with distrust*

However, altough educative animated films and filmstrips both experienced a joint development in the 20s, several issues may explain that their use remains marginal from the point of view of school education. Following teachers, cinema is considered by many as a possible interference between their speech and pupils. Activists for educative cinema present this fear of a «weakening» of the teacher's authority by the cinema and therefore give the cinema an illustrative and supporting role. As such, the filmstrip appears as an intermediate device that does not put into question the teacher's authority.

The filmstrip therefore answers the second criticism of animated cinema: it's too fast pace. But this mistrust, rather than being a true concern about this «new technology», also makes it difficult for educational cinema to develop economically because for film companies, it still represents an unprofitable «market». The 1930s catalogues remain very modest and do not satisfy pioneer teachers in this field, as the formats of filmstrips remain too various and incompatible with many of the video-projectors at that time.

In 1930, the magazine «Tout Cinema» remains optimistic and states:

> However, it is obvious that the decisive step will only be crossed if the State not only gives its moral support to private initiatives in educational cinema but also develops a program to be applied within public schools. One could also imagine a vast development of educational cinema in after-school works[15].

But in 1931, an accident stirred public opinion and illustrated the fears of the technical dangers of the cinema. During a film projection, a fire blasts in the projection room. Primary school teacher Stéphane Pitard (1908-1931) managed to save the 200 children of Castle-Renault boys' school but died from his burns.

After this episode, the Minister of Public Education and Fine Arts, Mario Roustan, implements several rulings forbidding the use of flammable films in schools, in the presence of pupils. However, as a matter of principle, he still officially encourages the use of films in schools by telling each school inspector that «subsidies may be granted on the Ministry of Education's budget for the acquisition [of cinematographic tools], yet any projection equipment must first be subjecte to technical approval»[16].

15 «Tout cinéma», april 1930, p. 12.

16 Nourrisson, Jeunet (dir.), *Cinéma-Ecole: aller-retour*, cit., p. 153.

1.5 *1952: idealized paradigm of the filmstrip and its scheduled end*

It is the circular of 30th January 1952, or the «Barangé Law»[17], which supports a generalized use of filmstrips in classrooms, by spending billion francs on technical and audiovisual teaching material in schools. Being very practical, filmstrips are much more favoured in schools' expenses than other film projectors or material, such as the typewriters. The *January 30th, 1952* circular underlines the interest of cinema at school:

> The film brings to the classroom a faithful representation of beings and things, makes observation possible where it is directly impossible and possesses an incomparable power of explanation and suggestion. It is thereby an admirably effective teaching tool, when used wisely: when it acts as an element of information within a class[18].

This law has offered to filmstrips a real economic boost by creating a market from which many publishers are going to benefit. For example, the Larousse publishing house displayed a complete catalogue which, according to their brochure, «offers an abundant choice of films designed for all teaching levels and all subjects likely to be represented by an image»[19].

Thanks to the 1951 circular, «the golden age» of filmstrips is set to begin. Publishing houses are multiplying: more than a hundred are created, in association with about forty projectors manufacturers. The number of filmstrips made in France between the 30s and the 60s is estimated between 15.000 and 20.000[20]. These figures illustrate the importance of still film production and the construction, in France, of a real economic market for still films.

Modestly, the CEDRHE's films come from about twenty publishing houses[21]. But the films also reflect citizen concerns and «great national causes» such as the fight against alcoholism, as well as private companies' interests which see in the film a way to «enter» the classroom.

Therefore, because of their themes and goals, whether religious or educative, filmstrips have been used both inside and outside the classroom. They served as visual devices for teachers during teaching session, at different levels, with

17 «Bulletin Officiel de l'Education Nationale», n. 6, 7 february 1952, and *Instruction du 30 janvier 1952 modifiée par la circulaire du 21 février 1952: Production et acquisition des films d'enseignement par le ministère de l'éducation nationale; acquisition des films d'enseignement par les établissements scolaires; régime de distribution des films par les cinémathèques de prêt (RLR 177-2a)*.

18 *Ibid.*, p. 189.

19 *Larousse Brochure*, Files of film fixe CEDRHE.

20 Lefebvre, *Films fixes et santé publique*, cit., p. 383.

21 The most present publishing houses are especially for religious films: Bloud & Gay, Maison de la Bonne Presse, Editions du Berger, La Centrale Saint Jean, Le Cinéma dans les œuvres, and for school films: Editions de la Photoscopie, Filmostat, Fixus-films, Larousse, Les Beaux Films, Les Editions Filmées, Les Editions Nouvelles pour l'Enseignement, l'Office de Documentation par le Film.

an emphasis on nursery and primary schools. Finally, the «scheduled end» of the filmstrip remains, most of all, a technical issue, with the development in the sixties of the slide, the projector and the television.

2. *CEDRHE's filmstrips: a means of discovering … and enriching education*

The recent donation by a primary school in Montpellier of four big boxes filled with filmstrips was the opportunity to focus deeper on this singular object, both from the point of view of its collection conditions and increasing importance, as of its importance for research in education history.

The CEDRHE owns a collection of more than three thousand filmstrips amongst which more than 700 are accompanied by notices or educational notes and commentaries, as well as pupils' exercise books containing commentaries on films[22].

We shall approach the CEDRHE's collection in two sections: its origins, and its current increasing importance.

A first inventory has enabled us to record more than 3.000 filmstrips, with almost as many duplicates, which are beginning to be catalogued in our database. Thus, the CEDRHE's filmstrips' collection appears to be one of the largest in France, along with those of the CREDIE of the ESPE of Lyon (10.000 filmstrips) and that of the Association for the Protection of Filmstrips of the Anjou diocese (ASFFA, 3.000 films).

Filmstrips are in multiple formats (8 mm, 9.5 mm, 16mm and 35mm), silent or sound. They have the appearance of a film, transparent or black, photographic with notched edges. The term «films» is excessive because they are in fact static images that the teacher could project on the walls of the classroom.

In fact, filmstrips consist of positive sides in black and white, sometimes with colour depending on the period. Films can be made of drawings, photographs, maps and are usually accompanied by a very brief commentary. The films are rolled up in small squares or round cardboard boxes, made of metal or plastic. The «duration» of the filmstrip is quite variable, ranging from a dozen frames to nearly a hundred frames. Even though multiple formats exist, the 35mm double-punched films were the most popular and most used even if they were also the longest. By the appearance of the boxes, it is even possible to identify easily some publishers: Les éditions filmées with its metal boxes, or the Larousse Editions, which are distinguished by round cardboard boxes, decorated with coloured stickers according to the discipline, and slightly larger than the film,

[22] H. André, S. Wagnon, *Le film fixe, histoire et aléas d'un support pédagogique*, in M. Figeac-Monthus (ed.), *Education et culture matérielle en France et en Europe du XVIe siècle à nos jours*, Paris, Honoré Champion, 2018, pp. 313-324.

in order to be able to contain an explanatory note. These explanatory notes were a support, with a few comments, and were a «ready-to-use» course for the teacher.

Filmstrips explicitly address nursery, primary teachings but are aimed also at secondary school teachers. The oldest films of our collection range from the thirties to the eighties. The oldest movie, from 1931, is entitled *The French primary school and the fiftieth anniversary of secular school*[23], while the most recent one, from 1981, is entitled *The public school is a hundred years old 1881-1981*[24].

We first began to resume the broad and classical typology of filmstrips (religious, entertaining and educational). For educational films, a finer typology by discipline appeared extremely random. In fact, many films «exceed» a school discipline as such (sciences, history, geography, visual arts), and some films are about everyday life (savings, vaccination, hygiene, alcoholism, «modern life», …)[25], making a typology by discipline inoperative.

3. *The example of a pupil's exercise book to understand the uses of filmstrips*

We have discovered in the CEDRHE's collection a pupil's science exercise book with filmstrips commentaries. More specifically, it is an exercise book of *Science: theoretical and practical classes* of 8th year, from the Henri IV high school of Béziers (Hérault). Having been used from 1954 to 1955, it belonged to Mr. Pierre Guibbert, founder of the CEDRHE, who was teaching secondary school before becoming a research professor at the IUFM (French School of Education) in Montpellier[26].

Firstly, we have made a series of quantitative estimates. We have counted 45 text pages (24 theory lessons and 19 practical activities) accompanied by 40 pages of drawings and sketches. In these practical activities, we found one observation on a wall board and 2 observations on photographs, 5 observations on microscopes and magnifying glasses, one on an experience, one on a dissection, and of course the point at issue here: 9 on the projections of filmstrips.

What did we notice in the projection of films with sound?

We noticed a variety of activities: 2 lists of titles on the various lenses, 4 commentaries on the films themselves, 3 sketches accompanying the titles on the lenses and 4 commentaries with the sketches.

[23] *L'école primaire française et le cinquantenaire de l'école laïque*, Editions filmées, 1931.
[24] *L'école publique a cent ans 1881-1981*, Fernand Nathan, 1981.
[25] P. Guibbert, *Le film fixe, vecteur d'une pédagogie impure*, «Tréma», n. 2, 1992, pp. 79-82.
[26] P. Boutan, *Hommage à Pierre Guibbert*, «Tréma», n. 23, 2004, pp. 1-2.

Some projection sessions do not appear to have brought any commentary, such as the one on gastropods or shellfish. On the other hand, one on arachnids, with a commentary written on the exercise book, offers various elements of understanding:

I saw on this filmstrip many arachnids such as the terrible tarantula or the lycose, terror of the Egyptians (with a sometimes-mortal sting). The enormous trap-doorspider and its closedhole, the tegenarious and the garden spider. After spiders, the subject moved on to scorpions: a Fabre fight (taken from the encyclopedia) and some other species. Then came the animalcules and other microscopic insects such as the dog tick, man and horse's sarcopte, and the trombidones or 'red mullet' [also called 'aoutat' in French because it appears in August]. Poisonous, tinder fungus, Satan's boletus and other deadly mushrooms such as the deadly fly-killing agaric[27].

What appears clearly in the observation of the exercise book is that filmstrips are used as a way of illustrating a theoretical lesson that has already been taught, or as an introduction to an upcoming class.

But how can we understand the use of filmstrips in classrooms? Is there a model lesson? How does the filmstrip find its place as an educational tool compared to exercise books or textbooks? And is it rather complementary or in competition with the latter?

First and foremost, it is important to explore both how this new device was received by teachers, and its educative use. Furthermore, one must question if the didactic uses are actually new and innovative, or if they are in fact only the reinterpretation and representation of traditional teaching methods. Beyond this binary question, did the filmstrips influence and transform teaching methods at all? As for any question about the history of methods, sources remain scarce, yet some professional magazines as well as teachers' essays allow us to develop several hypotheses.

We haven't found any other notebooks at the moment that help us to understand the uses of still films in the classroom. Nevertheless, it would be interesting to incorporate more examples, even from different periods, to see a specific evolution.

Conclusion

The filmstrip, more than an «innovative» tool by nature, reflects the use that is made of it. What clues do we have? How can we find a history of the uses of filmstrip?

[27] P. Guibbert, *Exercise book*, 15 février 1955, Files of film fixe CEDRHE.

First of all, through preparation films, such as the film *Film Projections Lesson*[28] which intended to explain to teachers how to use cinema in their classrooms. In addition to information about the maintenance and use of projectors, the film provides a method for managing the lesson using the cinematographic tool. In this film, the teacher controls the entire projection system in a classroom where fixed equipment has been previously set up for this purpose. The CEDRHE owns several manuals and explanatory notes written by publishers to «help» teachers prepare their film sessions[29].

It is, at most, a dialogued class in which the film consolidates or illustrates the teacher's speech. Can we therefore speak of a «documentary» study? In any case, the accompanying notebooks are intended to give the teacher the means for such a study from the point of view of content. However, very few methodological indications on the study by outline or otherwise are given.

However, beyond the motivation of the image as such (real or not), it seems that the widespread use of filmstrip is the result of a real ambiguity. The filmstrip is perceived as «modern» as the slide that replaced it from the 60s onwards, yet its use remains mostly «illustrative». It does not «contradict» the teacher, it is only a docile auxiliary. Finally, it can sometimes «domesticate» the teacher by imposing the logical continuation of its static views, by offering an interpretation (as a school textbook could do).

The history of the filmstrip appears to be an educational tool at the service of the history of education by making it possible to sketch a history of educational practices but also of the New Education. Indeed, the filmstrip was originally perceived as an «innovative» device at the service of a new pedagogy, but without any real transformation of the school and pedagogical organization, it will only be a tool at the service of «traditional» teaching based solely on the transmission of knowledge.

[28] Boutan, *Hommage à Pierre Guibbert*, cit.

[29] *Achetez votre film comme vous achetez un livre des éditions Editafilms; Les préparations de classe par le film des Editions nouvelles pour l'enseignement*, Files of film fixe, CEDHRE.

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The representation of school on NO-DO: visions of school practice on Francoist newsreels*

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ABSTRACT: The aim of this article is to analyze educational practice as presented on the images of NO-DO newsreels concerning schools. NO-DO was the official newsreel of the Franco regime, unique and obligatory, which spread the work of the government in propagandistic fashion. Educational practice itself is a secondary element on the NO-DOs analyzed; their objective was to make believe that education was an actual concern for the government and that it endowed the country with a significant number of schools, along with teaching material and adequate spaces. In the last stage of Franco's regime, NO-DOs used a revamped pedagogical discourse, but far removed from the reality of most Spanish schools. NO-DO was propagandistic in nature and therefore raises doubts about the actual scope of material improvements in schools and the implementation of an innovative educational practice.

EET/TEE KEYWORDS: NO-DO; Francoist newsreels; Educational practices; School practices; Spain; XXth Century.

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Introduction

News and documentaries are an invaluable source of information to learn about recent educational history. The use of this type of footage in historical-educational research is part of a methodological renewal trend that began in Spain at the beginning of the 21st century with the debates and first published works dedicated to the use of images in the history of education. This line of work has been mainly developed by María del Mar del Pozo[1] of the University of Alcalá de Henares and by Francisca Comas of the University of the Balearic Islands, with interesting contributions, focused largely on photography[2].

Amongst the various types of images used – drawings, photographs and film – we, the research group of the University of Vic, have specialized in non-fiction films and newsreels about education, leaving aside fiction films, which other authors have approached in regard to education in Franco's Spain[3]. Chronologically, our film research initially focused on the first third of the 20th century, analyzing the first productions of Spanish news and documentaries[4]. This first project was carried out under the name «RADAE. Review and Analysis of Propaganda documentaries and Educational Audiovisual Advertisements Produced Between 1914-1939 in Spain»[5]. Upon completion of the project, we moved into the years of the Francoist dictatorship; in order to research this period in time, we have inevitably relied on the NO-DO newsreel as the main audiovisual resource, given its chronological extension, the large amount of edited news and its connotation of «official screen» of the regime.

Like other totalitarian regimes, the Franco dictatorship created its own propaganda newscast: NO-DO (short for News and Documentaries). NO-DO sought to achieve ideological integration to Francoism rather than stirring up the masses. According to Saturnino Rodríguez, NO-DO was an instrument of Francoism, privileged in its socialization of the Spanish population; it was a «pulpit» from which its National Catholic orientation propagated[6]. NO-DO had centralized control, as it was the only source of audiovisual news in Spain

[1] M. del M. del Pozo, *Imágenes e historia de la educación: construcción, reconstrucción y representación de las prácticas escolares en el aula*, «Historia de la Educación», n. 25, 2006, pp. 291-315.

[2] F. Comas, *Fotografia i història de l'educació*, «Educació i Història», n. 15, 2010, pp. 11-17.

[3] V. Duran, P. Álvarez, *La imagen de la escuela en la primera etapa del cine español del franquismo: autarquía, patriotismo y nacionalcatolocismo (1939-1950)*, «Educació i Història», n. 31, 2018, pp. 59-88.

[4] P. Prat, A. Gómez, J. Casanovas, I. Carrillo, N. Padrós, E. Collelldemont, *L'educació representada als documentals de propaganda a Espanya (1914-1939)*, «Educació i Història», n. 31, 2018, pp. 35-57.

[5] The findings of the study are available on the website of the Museu Universitari Virtual de Pedagogia MUVIP <https://www.uvic.cat/museu-virtual/investigacions/radae> (last access: 09.09.2019).

[6] S. Rodríguez Martínez, *NO-DO, catecismo social de una época*, Madrid, Editorial Complutense, 1999, p. 17.

and its broadcast was mandatory in all film screenings. NO-DO was first screened in cinemas on January 4th 1943, it ceased to be mandatory in 1976 and its last production was in 1981.

NO-DO contents were quite varied, as Sánchez-Biosca and Tranche have pointed out, and they alternated two clearly differentiated news genres[7]. On the one hand, the newsreel contained ideologically categorical news that, particularly in the early years, had an impact on Francoist symbology, and reported parades, inaugurations, trips or economic achievements. The newscasts were characterized by an affected, imperial rhetoric in an attempt to imitate Nazi documentary propaganda, albeit with less resources. On the other hand, the news was quite heterogeneous and of little informative significance, delivering rather folkloric, popular, or touristic curiosities and unlikely anecdotes.

The subject of education appeared in both genres of NO-DO news mentioned above. This article will focus on school practice-related news that had an ideological or political function. Although school practice was not a relevant feature of NO-DO, it can be tracked by analyzing the images and narratives. School practices are part of the ordinary daily life of any school and, as such, they are not usually newsworthy, nor do they draw the attention of film cameras that tend to cover special events. However, as Sánchez-Biosca and Tranche point out, the «testimony of everyday life, the remarkable, the most insignificant tone in History»[8] also emerged on NO-DO images.

Our research group has carried out a study with around 2,000 entries related to education and NO-DO news produced between 1943 and 1975, from the beginnings of NO-DO until the year the dictator died[9]. These entries were the starting point for our selection of twenty NO-DO news that directly referenced primary schools, in which school practices within the classroom can be observed or inferred, since they show the classrooms' display, teaching material, school productions, ideological symbols or, naturally, students and teachers in full learning-teaching practice. We ruled out outdoors educational practice, despite the fact that there are several NO-DOs featuring physical education, gymnastics, camps or school sports. We decided against including outdoors activities as they took place away from the actual school environment. According to Javier Coterón, physical education during the Franco era was used as a stronghold of Falangist influence, which led to a progressive «distancing from the educational character that it should have had»[10].

[7] R.R. Tranche, V. Sánchez-Biosca, *NO-DO: entre el desfile militar y la foto de familia*, «Archivos de la Filmoteca», n. 15, 1993, pp. 41-53.

[8] *Ibid*., p. 18.

[9] E. Collelldemont (ed.), *Registro de los reportajes y noticias en los que aparece la Educación*, <https://www.uvic.cat/sites/default/files/registro_repnot.pdf> (last access: 06.09.2019).

[10] J. Coterón, *La educación física en los primeros años del franquismo (1939-1945)*, «Materiales para la Historia del Deporte», n. 10, 2012, p. 11.

NO-DO reports propagated the school practice model bred by the Franco regime, and they provided a view – albeit unrealistic at times – of school. The detailed analysis of contents, as well as the framing and recreated environment, contrasted against historical information, allows us to enter the schools from NO-DO's viewpoint and, at the same time, observe some dissonances, inconsistencies and gaps, and thus induce how school reality was manipulated in order to adjust it to the narrative of the regime as propaganda that aimed at legitimizing the regime itself. Three examples of dissonance are: first, the representation of active educational practices that reflect the central role of the teacher instead of the central role of student activity; second, magnifying school premises by means of presenting large, well-equipped schools, while, in fact, most schools could be better described as meagre; third, portraying the reopening of the Escuela de Mar in Barcelona in 1948 as an achievement, disregarding the fact that it had been destroyed in a bombing by pro-Francoist forces.

As Antonio Viñao has pointed out, two main stages can be distinguished in the field of education, with some features shared, to a greater or lesser extent, by both stages[11].

The first stage (1939-1957) was characterized by the prevalence of National Socialism, post-war repression and state inhibition regarding many educational issues, particularly the construction of primary schools. These were years of international isolation and economic autarchy.

The second stage (1957-1975) was a period of technocratic developmentalism, which featured a marked increase of official intervention in the field of education that took place in the form of technical and economic changes as a response to the social demands for improvement and welfare, thus legitimizing the regime. In this second stage, the 1970 General Education Act, a reform of the Spanish education system, deserves particular attention.

1. *The Era of National Catholicism (1939-1957)*

During the Franco dictatorship, teaching in Spain was controlled, directly or indirectly, by the Catholic Church. School was characterized by a National Catholicism based on patriotism and religion, built around the idea of a symbiosis between Catholicism and the Motherland as the historical foundation of Spain. The intended objective was to restore the tradition of the old Spanish school, as prior to the educational renovation and secularization that had taken

[11] A. Viñao, *La educación en el franquismo (1936-1975)*, «Educar em Revista», n. 51, 2014, pp. 19-35.

place during the Second Republic (1931-1939)[12]. NO-DO represented an interpretation of the history of Spain, and its mandatory projection on cinema screens contributed to the imposition of the dominant historical memory – the official one – regarding the recent past.

In the era of National Catholicism, school premises constituted the main focus of interest for NO-DO, relegating school practice, teachers and students to a secondary or even non-existent role. Most of the news reports about schools were related to the inauguration of facilities, in which the civil and religious authorities who presided the opening ceremonies stood out. Conceptually, the news was very similar to that of the days of the Primo de Rivera Dictatorship (1923-1930)[13] and, in turn, different from the documentaries of the years of the Second Republic (1931-1936) and the Spanish Civil War (1936-1939), a hiatus in the history of Spain with news and reports that reflected the progress brought about by educational renovation.

School practice was very timidly featured on NO-DO. In the era of National Catholicism, it was almost reduced to images of teaching material shown in empty classrooms, with desks lined up in rows and dark, blank chalkboards hanging on the walls. As we pointed out in a study previous to this article, school practice on NO-DO can be summarized in two words: blackboard and desk, which symbolize a period and an understanding of the practice that highlighted the learning result of the transmission[14]. Some schools maintained practices from the previous Republican period, which represented a resistance to official policies; these, however, were not featured in the documentaries of the time, barring a few exceptions[15].

The first NO-DO to show educational practice in a Spanish school was NO-DO number 94B (October 16th, 1944), titled *Holidays and School* and subtitled *After the summer break, the school year begins in Spain*[16]. This piece of news clearly represents the return to the tradition of National Catholicism, using the «back-to-school» theme in an apparently normal and stable context – an

[12] A. Mayordomo, *Aproximación a enfoques y tiempos de la política educativa*, A. Mayordomo (ed.), *Estudios sobre la política educativa durante el franquismo*, Valencia, Universitat de València, 1999, p. 12.

[13] J. Casanovas, E. Collelldemont, *La fachada de la escuela. La imagen de la enseñanza en los films documentales de inauguración de grupos escolares durante la dictadura de Primo de Rivera*, in P. Davila, L.M. Naya (edd.), *Espacios y patrimonio histórico-educativo*, San Sebastián, Erein, 2016, pp. 663-678.

[14] J. Casanovas, N. Padrós, *Pizarra y pupitre. La representación de la práctica escolar a través del NO-DO en las inauguraciones de escuelas durante franquismo*, in S. González, J. Meda, X. Montilla, L. Pomante (edd.), *La práctica educativa. Historia, memoria y patrimonio*, Salamanca, FahrenHouse, 2018, pp. 697-706.

[15] M. del M. del Pozo, T. Rabazas, *Políticas educativas y prácticas escolares: la aplicación de la ley de enseñanza primaria de 1945 en las aulas*, «Bordón. Revista de Pedagogía», vol. 65, n. 4, 2013, pp. 119-133.

[16] NO-DO, 94B, 16.10.1944, <http://www.rtve.es/filmoteca/no-do/not-94/1467430/> (last access: 19.09.2019).

outrageous fact considering the reality of those days: the immediate post-war period that left an isolated country marked by hardship, economic and social crisis, political repression and the impact of having come out of a long civil war that was still very recent. The post-war years, years of «poverty and hunger»[17], contrasted starkly with the weekly NO-DO newsreels that presented a biased account of reality, including school life[18], to the Spanish population, completely silencing the severe post-war economic crisis.

On *Holidays and School*, spectators could observe the change represented by the transition from holidays to the beginning of a new school year. However, this piece of news also contains an additional propaganda message that aimed at adding supporters to the regime. The message implicitly proclaims that Franco's dictatorship brought about a recovery of normal life after the Second Republic and the Civil War, which had allegedly been detrimental at all levels. NO-DO made no reference whatsoever to a past that had managed to curtail traditional religious influence on educational matters, but the message, though unvoiced, came across nonetheless. The renovated school practices, active learning and coeducation promoted in the years of the Second Republic were all forgotten in a single piece of news that, in a simplistic manner, emphasized a return to normality and the key role played by the Catholic church in education.

The *Holidays and School* news has several contradictions that reveal its propagandistic character. The footage opens with scenes that show a few children playing on an unoccupied beach. The narrator proceeds to speak about typical holidays where children play on the beach, which contrasts with the wide shots of the deserted beach. There is an obvious contradiction between discourse and image: a handful of children (all of which but one are boys) were picked for a scene on an otherwise bare beach. It is quite obvious that the only ones playing on that beach were the NO-DO children; the vast majority of Spanish children did not, yet the narrator states that «healthy and cheerful Spanish children play on the beach», thus presenting a sugarcoated image of childhood in the immediate post-war period, willfully ignoring the fact that those were difficult years plagued by hunger, among other serious problems.

The news then shows images of Madrid, where children are playing and people are rowing on boats in the central pond of the Retiro Park, to portray the holidays of children who live inland, away from the sea – and whose clothes reveal they come from well-off families.

The second part of the newscast features «back-to-school» images, showing the children's arrival at the doors of different schools. The scene of the first school is significant, as it presents a young priest, in a black cassock, standing at the school gate, welcoming pupils. This is a sharp, symbolic image of the fact

[17] R. Tamames, *La República. La Era de Franco*, Madrid, Alianza Editorial, 1979, p. 422.

[18] G. Barceló, F. Comas, B. Sureda, *Abriendo la caja negra: la escuela pública española de postguerra*, «Revista de Educación», n. 371, 2016, pp. 61-82.

that the Catholic church had regained control over education in Spain, hence fulfilling its desire to influence teaching[19]. Girls are shown going into a different school, welcomed by a female teacher, in a sequence that stresses single-sex schooling, thus eliminating mixed-sex education, which had been introduced in Spanish state schools during the Second Republic. The last seconds of the news report take place inside a classroom full of students, so the last images shown are of boys reading individually, sitting in aligned rows of desks. The teacher – the young priest in black who welcomed the students – supervises their reading from the classroom's central aisle. The scene clearly intends to underscore the role of the Catholic church in Spanish schools. Having analyzed the cinematographic code of the message behind *Holidays and School*, one can infer that it tallied with the official agenda of the regime, with a view to constructing an image of Spain in which religion was highly influential in educational matters.

After the 1944 *Holidays and School* news, three years went by without any other NO-DO images of primary schools in Spain. In contrast to *Holidays and School*, no school practices were actually shown, though buildings, political and religious symbols, school furniture and teaching material were indeed showcased, all of which hinted at classroom practice. It was only during the second stage – that of technocratic developmentalism – that NO-DO placed its focus back on students' educational activity.

The first newscast featuring the opening of a primary school was on NO-DO 259A (December 22nd, 1947)[20]. Oddly enough, it was included in the second part of the news titled *Spanish Constructions*, which opened with the construction of a runway at the Manises airport (Valencia). The news was about the inauguration of several public buildings in the municipality of Puebla de la Sierra in Madrid, including the city hall, the law courts, a church and, naturally, the school. The city hall had been destructed in the civil war, while the church had suffered severe damage as a consequence of the siege by Franco's troops. In the middle of the post-war, the news highlighted the reconstruction carried out following the end of the armed conflict. The school practice depicted was used as an example of the normalization of education in the context of a Francoist classroom. The reference to school practice on this 1947 NO-DO consists of fleeting images: a brightly-lit classroom, devoid of pupils, where all that seems to stand out are the students' desks and a small blackboard. Some classroom materials are also exhibited, such as a chalkboard compass, a set square, a tee plate and a goniometer or protractor to do geometry exercises on the board. The desks are all equipped with a built-in inkwell, as well as a small, individual chalkboard and a wooden chalk box.

[19] R. Navarro, *La enseñanza primaria durante el franquismo (1936-1975)*, Barcelona, PPU, 1990, p. 40.

[20] NO-DO, 259A, 22.12.1947, <http://www.rtve.es/filmoteca/no-do/not-259/1467623/> (last access: 23.09.2019).

The presence of government representatives on the piece of news about Puebla de la Sierra was limited to the opening images. In the years to follow, the authorities gained more presence on the frequent news regarding inaugurations and various visits gathered by NO-DO. It was a way to disseminate the government's work and to introduce ministers and other representatives, regarded as positive news, which became increasingly frequent on NO-DO. Although already present at the end of the 1940s, news about openings and visits incremented starting in the 1950s, at a time when Spain experienced a small economic growth that stood in sharp contrast to the previous period of stagnation[21]. Araceli Rodríguez Mateos questions the image of progress that NO-DO wished to project, stating the following:

> […] the cinematic chronicle of political life could better convey the idea of Spanish progress. So much so that it overrated it. The weekly succession of only positive news was a determining factor. But, in addition, its representation distorted reality, as the levels of economic development and general well-being that were suggested had not yet been reached[22].

Information on opening ceremonies and visits shared the same narrative and audiovisual format, which were deemed appropriate for all sorts of openings and visits, whether featuring a dam, a block of flats, a factory or a school. NO-DO editors imposed a kind of story template that showcased progress regarding openings and official visits from the Spanish authorities[23]. In the case of elementary education, such progress focused almost exclusively on the opening of school facilities and rarely on the progress brought about by certain learning practices. The news, in turn, conveyed a return to a school tradition in which the Catholic church played a fundamental role, reinforcing the ideological values of the regime.

NO-DO newscasts on openings and visits all followed a single narrative guideline that had common audiovisual features. Visually, a simple, linear narrative with cut-based editing was established. It identified the government representatives and then centred on the description of the inaugurated facility. The opening of, or visit to, several buildings (schools amongst them) in one same official visit to a town or municipality was common practice. The news about Franco's visit to Burgos on NO-DO 553B (August 10th, 1953) is a good example.

Franco in Burgos, as shown on NO-DO, opens with the images of his visit to a new mint and continues with the opening of a new school named after Francisco Franco himself[24]. The narrator highlights the fact that the new school

21 Tamames, *La República. La Era de Franco*, cit.

22 A. Rodríguez Mateos, *La imagen política del Régimen en el noticiario NO-DO (1943-1959)*, Madrid, Ediciones Rialp, 2008, p. 167.

23 *Ibid*., p. 34.

24 NO-DO, 553B, 10.08.1953, <http://www.rtve.es/filmoteca/no-do/not-553/1487703/> (last access: 27.09.2019).

will «welcome a thousand students». The images show the facade of a large, three-storey building intended to serve a vast number of students, with capacity to host twenty graded classes, ten for girls and another ten for boys. Serving a thousand students implied there would have to be fifty students per class, which clearly meant overcrowded classes. Furthermore, the voice-over generally emphasized that the school represented «great educational progress». The images show representatives, headed by Franco himself, touring a building with spacious classrooms equipped with tables to be shared by four students, each topped with a basket of flowers. Images of a classroom featuring Montessori-influenced material, such as a pink tower, can also be seen, but based on the shades of grey we can infer that it did not comply with the Montessori principle of working with a single dimension per material (shape, volume and colour). This NO-DO newsreel draws special attention to the quantitative elements of classrooms and students, and only mentions or shows a few teaching materials from which we can infer a certain educational practice that is obviously intended to be portrayed as innovative, but which leaves a lingering doubt regarding its use, as school practice itself is never shown.

On NO-DO 615A (October 18th, 1954), Franco's wife, Carmen Polo, is seen inaugurating the school José M. Sanchís Taberner, whose bust is shown, during her visit to the town of Aldaia, close to Valencia[25]. Surrounded by a crowd, Polo enters the building where other government officials stand at the door of a traditional classroom, equipped with a blackboard, rows of desks, a crucifix, and pictures of Franco and José Antonio. What interests us are the maps of different countries and of the Iberian Peninsula that hang on the back wall, in addition to a cabinet stocked with geometry teaching material and a globe perched on top. These very few materials point at a willingness to demonstrate that the school had certain teaching equipment used for educational practice.

In her book on the political image of Francoism on NO-DO, Araceli Rodríguez Mateos points out that education was one of the fields that aroused greater interest[26]. Amongst the ministers of different offices and periods, spectators became familiar with those in charge of the education portfolio, particularly with José Ibáñez Martín in the early years. Ibañez was Minister of Education from 1943 to 1959, and his was one of the most popular faces on NO-NO. The management of his ministerial office featured in around one hundred newscasts, out of which he only starred in three pieces of news about primary schools in which school practice can be seen[27]. The Minister of Education was at the forefront of NO-DO news on an array of different subjects, such as university, scientific research, visits, openings, and various commemorations and awards.

[25] NO-DO, 615A, 18.10.1954, <http://www.rtve.es/filmoteca/no-do/not-615/1483169/> (last access: 26.09.2019).

[26] Rodríguez Mateos, *La imagen política del Régimen en el noticiario NO-DO (1943-1959)*, cit., pp. 169-178.

[27] *Ibid*., pp. 118-119.

The Minister of Education attended very few primary school openings. On NO-DO, such openings starred Franco himself, in addition to other regime representatives. Regardless of the presence of the Minister, NO-DO school openings followed the same narrative pattern in which school practice itself played a very minor, secondary role.

The first newsreel that featured the Minister of Education inaugurating a school was NO-DO 310A (December 13th, 1948)[28]. The news was about the Escuela del Mar in Barcelona which, having been destroyed in a fire resulting from a bombing by Fascist air forces in 1938, was temporarily relocated until the opening of the new school premises. The camera focuses on the outside of the building, its blessing and the attending government representatives, José Ibañez Martín amongst them. From the inside of the building, only the library – equipped with large tables, straw-bottomed chairs and sparsely populated bookshelves – can be seen. Founded by the Barcelona City Hall in 1922, the Escuela de Mar followed the social hygiene principles, implementing outdoors active learning. On NO-DO 310A (which does not have the original audio), no such educational practice is showcased. A second NO-DO, however, did feature active teaching. The news, from 1972, was about the 50th anniversary of the opening of the school, which we will analyze at the end of the developmentalist stage.

NO-DO 364B (December 26th, 1949) features the news titled *Opening of the Teodoro Llorente School and the Sports Grounds at the University Campus* in Valencia[29]. The newsreel (which also lacks the original audio), is about a school inaugurated on the 13th December 1949 by the Minister of Education, José Ibañez Martín, joined by Marcelino Olaechea, the archbishop of Valencia, as well as the general captain, the governor and the mayor.

The images of the Teodoro Llorente school show the facade of the building, which had a large Francoist coat of arms with the eagle of Saint John and the Spanish flag. The coat of arms wasn't removed until 2017, forty-two years after the dictator's death, one of the last Francois symbols displayed in public buildings in Valencia. In the street, a group of people with a wait-and-see attitude can be seen, which contrasts with the images of enthusiasm and ovations seen on other, more elaborate NO-DOs. Inside the school, the camera shows a classroom with aligned desks, a large blackboard above which hang three political and religious portraits; though they cannot be identified, the portrait of Franco is sure to be amongst them. Francoist symbology is far more present than educational practice.

[28] NO-DO, 310A, 13.12.1948, <http://www.rtve.es/filmoteca/no-do/not-310/1467231/> (last access: 26.09.2019).

[29] NO-DO, 364B, 26.12.1949, <http://www.rtve.es/filmoteca/no-do/not-364/1468088/> (last access: 27.09.2019).

The final scene stands out, as the Minister of Education and the archbishop of Valencia – two of NO-DO's main characters – shake hands in front of the camera. This image reinforces the importance given to the Catholic church in primary education, even at the expense of other local authorities such as the mayor, who, contrary to the archbishop, actually intervened in the construction of the school: Teodoro Llorente was a local state school, built on the initiative of the Valencia City Hall with funds from the Ministry of Education.

The local boarding school Virgen de la Paloma in de Alcalá de Henares, near Madrid, was opened on the 10th October 1951 by Joaquín Ruiz-Giménez, the Minister of Education, in a ceremony telecasted on NO-DO 459B, whose audio has been lost[30]. This is the third example of one of the few news about school openings in which the Minister of Education is the leading figure. In contrast to the previous newsreel, the protagonism of the authorities on the images shown is limited: though there are several close ups of the Minister, the school facilities feature more prominently, for instance a bright classroom with rows of desks and the symbology of the national Catholic school on its walls, a crucifix and Franco's portrait. A gymnastics exhibition on the schoolyard is also shown exhaustively through images of children standing in line performing arm and leg exercises. This kind of gymnastics demonstration was closely associated to boarding schools, and therefore it is not surprising to find such footage on this newscast.

The presence of the Minister of Education did not change the narrative on Spanish schools on NO-DO newsreels. Educational practice had, at least on this first stage of prevailing National Catholicism, a very limited presence. On the second stage, that of technocratic developmentalism, some ideological and political aspects were kept, but there was an increasing interest in showing a school that was adapted to modern times, one in which pedagogy had a more relevant role. NO-DO responded accordingly and also reflected a wider presence of educational practice than in the previous stage.

2. *The Era of Technocratic Developmentalism (1957-1975)*

The end of international isolation brought about by agreements with the United States in 1953, Spain joining the UN in 1955, the appointment of technocrat ministers belonging to the Opus Dei in 1957 and the 1959 Stabilization Plan marked the beginning of a stage of economic and social development in Spain. Educational policy was put at the service of technocratic developmentalism, in which the 1960s were crucial; a literacy campaign was put

[30] NO-DO, 459B, 22.10.1951, <http://www.rtve.es/filmoteca/no-do/not-459/1469492/> (last access: 30.09.2019).

into motion in 1963, there were plans to build schools, and new pedagogical-bureaucratic techniques for the management of the education system were introduced[31]. Starting in 1970 with the adoption of the General Education Act, the process of the most important reform of the education system in the history of contemporary Spanish education began[32].

As regards NO-DO newscasts about schools, the era of technocratic developmentalism differed from the previous National Catholicism stage mainly because of the regime's foreign openness and the deployment of a more active educational policy. NO-DO news about schools introduced a slightly more elaborate pedagogical narrative and included more scenes with students, some even featuring school practice. On NO-DOs about technocratic developmentalism schools, the need to convey the improvements that were allegedly carried out were highlighted, with quantitative information and images on material progress, including the number of school places and schools built, or images of school facilities and teaching material.

An example of the change of era is NO-DO 913B (July 4th, 1960) about the Estilo school in Madrid[33]. Founded in 1959 by writer and educator Josefina Aldecoa, the school was a pioneer in coeducation in Spain. Its female teachers were «victims of Francoism on account of having experienced the republican school, whose principles and methods could be implemented in the school», such as teamwork and active learning[34]. The Estilo school was a peculiar place led by Josefina Aldecoa on the principles of a wholly free, secular education in which spontaneous artistic expression on the part of students was of the utmost importance[35]. The latter was clearly reflected on the newsreel images, as it was the central theme of the news.

Contrary to most of the news from the previous era, here boys and girls are shown engaging in teaching and learning activities, thus constituting a very different image to the one offered so far, since the focus of the news is now on the students and their artistic activity, particularly their creations, but not leaving aside teaching material that is presented in greater degree and, more importantly, far more modernized (varied art material, alphabet boxes with letters for composing words, books in English).

The narrative is also different from other NO-DOs analyzed, and the teaching discourse as well as the practice shown are much more innovative. Statements such as «learning is based on the rule of teaching through playing»

31 Viñao, *La educación en el franquismo*, cit., p. 27.

32 A. Escolano, *La educación en la España contemporánea. Políticas educativas, escolarización y culturas pedagógicas*, Madrid, Editorial Biblioteca Nueva, 2002, p. 168.

33 NO-DO, 913B, 04.07.1960, <http://www.rtve.es/filmoteca/no-do/not-913/1470097/> (last access: 31.10.2019).

34 *Josefina Aldecoa: La mirada de la Institución Libre de Enseñanza*, «Participación Educativa», n. 5, 2007, p. 106.

35 Information given orally by Maria del Mar del Pozo on the 28th October 2019.

or «the creative impulse of children's personality finds its direct expression in artistic activity» which «positively influences the learning of graphic expression and integral intelligence» brought us closer to a vision that was much more coherent with the view of child development and the pedagogy of those days, which reached us from other contexts (mainly European and Anglo-Saxon ones). This even went as far as mentioning the figure of the school psychologist who would work together with the teaching staff.

The news, seen without taking into account the general education context, may well point to the fact that the schools were well equipped both in terms of material (innovative and plentiful) and in terms of staff (they mention small groups and the figure of the school psychologist), as well as to the fact that the pedagogy implemented was very similar to that of our neighbouring countries. In fact, nothing could be further from the truth: as we well know, many people still had no access to schooling[36], there are accounts from the period that confirm that teaching material was scarce and was often made by teachers themselves, and that class organization was much more individualized and based on memorizing[37]. It appears that the reality of most of the country's schools was far from the image portrayed on the news.

The construction and opening of new school facilities was a recurrent theme on NO-DO during the whole dictatorship. The shortage of schools was a pressing problem in Spain which the regime's propaganda wanted to portray as fixed. During the first years of Francoism, NO-DO would broadcast the inauguration of singular buildings that did not actually respond to a general planning. Starting in 1958, there was a change, and the news began showing the construction of several schools at the same time. This change coincided with the beginnings of the technocratic developmentalism era, when five-year plans for the construction of schools were designed and developed. On these NO-DO newscasts, school practice was secondary; the main objective was to show that Franco's government was building a great number of schools, relegating pedagogy and school practice to a secondary role.

NO-DO 787A (February 2nd, 1958) includes the news of the opening of an exhibition about the Five-Year Plan for the Construction of Schools (1956-1960) in Madrid[38]. The news contains endless figures both on the voice-over and the graphs that were part of the exhibition, for instance the figures regarding the decrease of illiteracy in Spain or the construction of schools in every Spanish province. This clearly attempted to send a strong message of the soundness of the government policy regarding the construction of schools. Amongst the figures provided, the number of new schools to build stands out at 24,826.

36 Viñao, *La educación en el franquismo*, cit.

37 V. Guichot, *La cultura escolar del franquismo a través de la historia oral*, «Cuestiones Pedagógicas», n. 20, 2010, pp. 215-245.

38 NO-DO, 787A, 03.02.1958, <http://www.rtve.es/filmoteca/no-do/not-787/1486260/> (last access: 15.10.2019).

A mind-boggling figure that aimed at dazzling the spectator but that was, in fact, insufficient considering the actual demand. In order to achieve universal schooling, in addition to building those nearly 25,000 schools, 17,000 more would need replacing on account of the poor conditions of the buildings, which brought the total number of schools needed to 42,000, according to school inspection reports of the time[39].

One concrete example of the plan mentioned above was the opening of the Lepanto school in Barcelona. The school was inaugurated by Pablo Martín Alonso, Captain General of Catalonia, who was at the helm of a civil, military and religious entourage that also inaugurated the breakwater promenade[40]. NO-DO 877B (October 26th, 1959) emphasized the fact that the building of the new school was in the Barceloneta district. The images show the facade of a modern, three-storey building, and then showcase government representatives touring some classrooms, devoid of students but with teaching material to spare. Classrooms featured are equipped with square and round tables topped with flowers, games and open books. A typical classroom with rows of desks and a large blackboard is shown at the end. Since the Barceloneta is a working-class district, the NO-DO images implied that no resources had been spared to equip the new school for the children of the area.

The news titled *Operation School* included in NO-DO 931C (November 7th, 1960) was once again about an exhibition in Madrid about the National Plan for the Construction of Schools[41]. Images of school models and photographs of classrooms and materials feature prominently. Years later we begin to find news on NO-DO about the opening of several schools in the same ceremony, as shown for the first time on NO-DO 1081B (September 23rd, 1963) on the opening of twenty news schools in different neighbourhoods in Madrid[42]. The opening ceremony is headed by the Minister of Education, Manuel Lora-Tamayo, who visits some schools amongst which the narrator mentions one in the district of Moratalaz. The images depict classrooms with no students and some geography material (atlas, maps and globes).

NO-DO 1345A (October 14th, 1968) insisted again on figures. This time, General Francisco Franco himself is shown inaugurating the school Nuestra Señora de la Concepción in Madrid and visiting an exhibition about a new Five-Year Plan for the Construction of Schools, where he symbolically inaugurates 4,184 schools distributed across Spain which, according to the voice-over,

39 E. Lázaro, *Historia de las construcciones escolares en España*, «Revista de Educación», n. 240, 1975, p. 120.

40 NO-DO, 564A, 26.10.1953, <http://www.rtve.es/filmoteca/no-do/not-877/1485738/> (last access: 26.09.2019).

41 NO-DO, 931C, 07.11.1960, <http://www.rtve.es/filmoteca/no-do/not-931/1469780/> (last access: 18.12.2019).

42 NO-DO, 1081B, 23.09.1963, <http://www.rtve.es/filmoteca/no-do/not-1081/1468846/> (last access: 18.12.2019).

guarantee primary education for 168,000 children[43]. These new schools opened their doors for the first time in the 1968-1969 school year.

During the opening ceremony, the 1968-1969 school year was officially opened in Spain. The Minister of Education, José María Villar Palasí, gave a speech that was not featured on NO-DO. The newsreel focused instead on General Franco and his wife, who received a commemorative plaque from the school's students. According to the newspaper *ABC* from the 3rd October 1968, the Minister of Education declared that «the figures provided are the irreversible testimony of a government task that, without exaggeration, may well be regarded as effective». The figures, regardless of the Minister's words, do seem exaggerated; in the same speech, the Minister stated that, although the estimated number of new schools to open was only 1,700, in the end the total number was 4,184, more than twice the original estimate. This wide disparity in figures cannot be accounted for and, despite the efforts made and the great cooperation mentioned by the Minister, reasonable doubts regarding the criteria used to calculate that much higher number are not dispelled. Regardless of the accuracy of the numbers, what is of interest here is to highlight the propagandistic use of large figures to prove the government's effectiveness. Such effectiveness, in any case, was limited to the construction of school buildings and did not display any school practice, which is, in fact, far more difficult to quantify.

However, this newsreel on school construction was not only about figures; there was a certain willingness to show a modern teaching practice by means of displaying school material that, presumably, Spanish schools had in order to use it to carry out teaching activities. We see it as one more element of a growing interest in addressing pedagogical aspects – surely just a small example regarding educational practice that responded to a change in direction detected in this era of technocratic developmentalism[44]. The images from the 1968 NO-DO feature maps, models, photos of school buildings and, surprisingly, an enormous swimming pool and a model with an athletics track, while the narrator tells us that schools are equipped with suitable facilities whose construction responds to a very ambitious plan. There is a scene with an overhead projector that displays the image of an engine at work on a screen. From the overhead projector images we can hardly deduce that the thousands of new schools were equipped with such material, though the images seem to imply so. The discourse, which appears to be close to that of National Catholicism, has several differences, particularly as regards the use of large figures and a growing interest in showing a certain modernization in teaching.

[43] NO-DO, 1345A, 14.10.1968, <http://www.rtve.es/filmoteca/no-do/not-1345/1486405/> (last access: 17.10.2019).

[44] S. Gómez, X. Motilla, *Iconografía de la modernización educativa en España en el contexto de la Ley General de Educación de 1970*, «Historia y Memoria de la Educación», n. 8, 2018, pp. 449-487.

Public action in education in Spain in the last years of the regime focused on generalizing basic schooling through the construction of schools. During this final stage, NO-DO news showcased information about the opening of new schools located in the most populated cities of the country, where there was a great shortage of school places. NO-DO 1403B (November 24th, 1969) featured the opening of seven new schools in the outskirts of Madrid by the Minister of Education, Villar Palasí. According to the narrator, the schools «have been equipped with the most modern facilities and teaching materials»[45]. These schools were part of a plan that aimed at creating more than 100,000 school places. The information underscores figures, in a similar way to NO-DO 1363B (February 17th, 1969), in this case regarding the construction of five new schools in Barcelona to «solve education problems», and also gives detailed figures of hundreds of students[46]. On these NO-DOs, teaching aspects are once again relegated to a secondary plane, showing some images of school material and boys and girls in class, the youngest ones sitting at round tables, apparently participating in class, while older pupils, sitting on two-student desks, are copying something from the board (though it is not shown on screen). Images of school canteens are also shown on both newscasts and, once again, the premises appear to be very modern.

Towards the end of the regime, after the adoption of the 1970 General Education Act, a certain change was brought about in the schooling model in Spain, which was reflected on NO-DO news in the use of a pedagogical language, but which continued focusing the information on the material and technical aspects of education. The General Education Act, also known as the Villar Palasí Act after the Minister of Science and Education, was conceived as a great reform tool for education in Spain, but, as educator Marta Mata points out, it was not a radical reform from the point of view of pedagogy, but rather «a material and technical improvement» of education in Spain[47]. Amongst the improvements, Mata states that the training period for teachers was extended, constructions and school material were improved, new pedagogical institutions were created «to resolve the stagnation of old teaching staff and civil servants»[48]. According to Mata, such improvements did not eliminate the need to maintain summer schools for teachers, such as the Rosa Sensat School of which Mata herself was a central figure. In this summer school, deeper pedagogical changes were transmitted, as well as a renovated school practice.

[45] NO-DO, 1403B, 24.11.1969, <http://www.rtve.es/filmoteca/no-do/not-1403/1486675/> (last access: 23.10.2019).

[46] NO-DO, 1363B, 17.02.1969, <http://www.rtve.es/filmoteca/no-do/not-1363/1487036/> (last access: 23.10.2019).

[47] M. Mata, *La Escuela de Maestros Rosa Sensat de Barcelona*, «Perspectivas. Revista trimestral de educación», vol. 15, n. 53, 1985, p. 134.

[48] *Ibid.*

The reforming trends of the General Education Act were reflected, in part, on NO-DO, displaying a will for pedagogical change; however, there is no evidence as to whether it materialised. Under the name *The challenge of our times*, NO-DO 1414A (February 9th, 1970) about the General Education Act shows this reform-oriented willingness in the title[49]. On the newsreel, which runs longer than usual, the narrator points to problems in education such as the accumulation of subjects with a «weak didactic approach» or the shortcomings of memory-based teaching, linked to exams that are based, in turn, on what the students remember rather than on what they actually know, while showing a primary school student who, standing up in a classroom, recites the day's lesson. There was, indeed, a need to go beyond such educational practices, but NO-DO did not reveal any alternative options, but rather continued giving school buildings and class material a prominent role.

NO-DO 1414B (February 9th, 1970) explains the educational reform brought about by the General Education Act, showing images of school practice on the different stages of education[50]. The news is about preschool and primary education, and this time the images do portray an innovative educational practice: preschool students sit in a circle on the floor with drawings, while some others do exercises to develop fine motor skills. The teaching of writing skills with syllables associated to drawings and the use of a slide projector in the classroom are also featured on this NO-DO edition. These examples of school practice, however, just helped to illustrate a discourse that the narrative focused on the organizational and material aspects of the General Education Act. In stark contrast to what was portrayed on NO-DO, there were a few documentaries from independent, amateur filmmakers related to the Rosa Sensat school, which featured a more elaborate pedagogical discourse and interesting images of school practice, quite different from what is shown on NO-DO footage. Our research team is currently analyzing them.

In the 1970s, the scenes featuring educational practice increased on NO-DOs about schools, in line with the reformist discourse of those days. Nevertheless, the images of students, school material and school productions were merely complementary: they were just a way to illustrate news whose main message was the alleged material improvement in education, while the discourse barely touched upon pedagogical practice. For instance, the opening of the Virgen de Atocha school in Madrid in 1970, featured on NO-DO 1432B (15th June)[51] opens with an academic ceremony in a large hall. This is followed by a visit to the school facilities in which the focus is on a classroom where the students'

[49] NO-DO, 1414A, 09.02.1970, <http://www.rtve.es/filmoteca/no-do/not-1414/1486749/> (last access: 22.10.2019).

[50] NO-DO, 1414B, 09.02.1970, <http://www.rtve.es/filmoteca/no-do/not-1414/1486753/> (last access: 23.10.2019).

[51] NO-DO, 1432B, 15.06.1970, <http://www.rtve.es/filmoteca/no-do/not-1432/1486511/> (last access: 25.10.2019).

handcrafts are displayed on the tables and the walls are decorated with murals created by students. The school laboratories are also shown, and the segment closes with a sports exhibition in the schoolyard.

NO-DO 1520A (February 21st, 1972) addresses the inauguration, headed by José Maria Villar Palasí, Minister of Education, of the exhibition *The Ongoing Educational Reform* in Madrid[52]. The exhibition reflected the work carried out since the adoption of the General Education Act, displaying scale models of schools and a wealth of modern teaching material. Direct school practice, however, was absent altogether. The exhibition also included the documentary *A Reform Begins*, produced by NO-DO, that did present several examples of school practice[53]. A few sequences of the news *Education and Development* from NO-DO 1543B (July 31st, 1972) have images of renovated school practice like teamwork when the narrator explains that «what will characterize the Spanish education system in the 1970s is not so much its quantitative increase as the deep transformation of its teaching methods» and continues to say that, with the General Education Act, learning «will no longer be a constant stream of data and figures but a stimuli of the student's creative abilities», illustrating the sequence with images of art, music and dance classes[54].

The implementation of the General Education Act, as Antonio Viñao and Pedro Luis Moreno point out, was centered on the basic education period (ages 3 to 13), and there was a progressive devaluing of the initial objectives, caused by a lack of the necessary economic resources[55]. Regarding schooling, the original objectives were not particularly optimistic, as they aimed at schooling, free of charge, all the population aged 6 to 13 in school buildings whose dimensions and spaces were difficult to achieve with the funds available. Economic limitations, worsened by high birth rates in the 1960s, forced investment in some regions of Spain at the expense of the rest of the country. These material constraints, needless to say, were not featured on NO-DO.

Starting with the 1970 General Education Act, there was an «undeniable pedagogical deployment» in the Spanish education system, according to Alejandro Mayordomo, which was reflected on NO-DO[56]. NO-DO news showed a biased approach to reality since, as Mayordomo asserts, «there [was] a fundamental discrepancy between an innovative discourse and an administrative organization of the system that [was] inadequate and full of

52 NO-DO, 1520A, 21-02-1972, <http://www.rtve.es/filmoteca/no-do/not-1520/1469374/> (last access: 22.10.2019).

53 NO-DO Documentary, *Comienza una reforma*, <http://www.rtve.es/alacarta/videos/documentales-color/comienza-reforma/2892442/> (last access: 23.10.2019).

54 NO-DO, 1543B, 31.07.1972, <http://www.rtve.es/filmoteca/no-do/not-1543/1487365/> (last access: 18.12.2019).

55 A. Viñao, P.L. Moreno, *Escolarización y alfabetización*, in B. Delgado (ed.), *Historia de la educación en España y América. La educación en la España contemporánea (1789-1975)*, Madrid, Ediciones SM, 1994, vol. 3, pp. 918-919.

56 Mayordomo, *Aproximación a enfoques y tiempos de la política educativa*, cit., p. 31.

derogations»[57]. There were apparent changes indeed, with inconsistencies between the innovative discourse and the educational practice carried out, which NO-DO failed to consider altogether as its objective was to disseminate the work of the regime and not its non-application or its contradictions. In this stage of development we can confirm, once again, that on school-related NO-DOs there was a clear gap between discourse and reality. Towards the end of Francoism, and despite a few material and organizational improvements tinged by a renovating pedagogical discourse, innovative educational practices shown on NO-DO did not correspond to the reality of most schools in Spain.

The first NO-DO analyzed in the stage of technocratic developmentalism was about the Estilo school, an innovative school in Madrid. We would like to finish with a newsreel on the 50th anniversary of the Escuela de Mar in Barcelona, as seen on NO-DO 1558A (November 13th, 1972), in which a number of scenes of active school practice are featured: classes held outdoors, team games, artistic expression and a lecture delivered by a student in front of his classmates[58]. These two NO-DOs are an exception compared to the rest of the newsreels analyzed. Both schools, whose foundations were in the pedagogical movement that took place prior to the dictatorship, and particularly the fact that they were featured on NO-DO, attest to the failure of the regime's official policy regarding basic education.

Conclusions

The overview of the different news presented on NO-DO about school allows us researchers to analyze both the form and content of the school propaganda produced by a totalitarian regime. This implies the possibility of approaching the hidden strategies of persuasion that aimed at establishing a pattern of how to be a citizen, based on the modeling of the actions of public institutions – such as schools – and the entrenchment of cultural habits. On the school-related news, we can observe how the educational guidelines of the regime tainted the different oral and visual messages by means of transmitting a standardized course of action, unified in form as well as content, that set a discourse on school practice, normalizing trends and proposals.

The deconstruction process of the messages entailed by the analysis of the news allows us to understand how some of the prototypical elements of schools came to be part of the collective imaginary, such as classrooms – that, albeit being a space for children, were predominantly populated by adults – with rows

[57] *Ibid.*

[58] NO-DO, 1558A, 13.11.1972, <http://www.rtve.es/filmoteca/no-do/not-1558/1470742/> (last access: 25.10.2019).

of desks, blackboard at the front, patriotic and religious symbols, or reading, geometry and geography materials. Between 1943 and 1957, construction elements became the focus, symbolizing the alleged restoration of the state that was being promoted. In the second part of the period, between 1957 and 1975, there was an increase in the messages of concern for schooling, screened by a technocratic and economist perspective. However, the materials featured are the same as in the previous period, complemented by other teaching tools. On this second stage, we can clearly see an appropriation of the different pedagogical discourses established during the Second Republic or even before it. An example of this appropriation is the representation of the learning activity as a central axis in fields such as arts and crafts, which was, at the time, merely complementary.

As a final conclusion of our research, we can highlight propaganda strategy, persuasion and appropriation of singular school practices as key elements that did not actually imply an improvement in education for all boys and girls.

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School textbooks, didactic material and a new approach in music teaching in Catalonia with the opening of the School of musical pedagogy – Ireneu Segarra method*

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ABSTRACT: The School of musical pedagogy – Ireneu Segarra method (EPM-MIS) was mainly founded to teach the methodology designed by Ireneu Segarra in the early 1970s in Catalonia. This institute published school textbooks and specific didactic material on the method to be used in different years during what was then known as General Basic Education within the framework of the Spanish General Education Act. This article aims to delve into and highlight the contribution made from the method promoted by the EPM-MIS and the published school textbooks and original and specific didactic material, both in constructing a new approach to music teaching in Catalonia and in promoting and enhancing Catalan identity and culture in the 1970s and 80s.

EET/TEE KEYWORDS: History of music education; Pedagogical renewal; School textbooks; Didactic materials; School of musical pedagogy; Catalonia; XXth Century.

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Introduction

The School of musical pedagogy – Ireneu Segarra method (EPM-MIS by its Catalan acronym) was mainly founded to teach the methodology designed by Ireneu Segarra in the early 1970s in Catalonia. The EPM-MIS intended to contribute to the standardisation of music teaching, being dedicated to the research and development of materials, and the production and testing of a learning programme for all stages in obligatory state education, as well as for music schools and conservatoires, with a view to providing a new approach to music teaching and learning processes. It offered training courses for teachers to supplement their initial training and published school textbooks and specific didactic material on the method to be used in different years of what was then known as General Basic Education (EGB by its Spanish acronym) under the General Education Act (LGE by its Spanish acronym) in Spain, as well as other books and material on musical language for use in music schools and conservatoires[1].

This article aims to delve into and highlight the contribution made from the method promoted by the EPM-MIS and the published school textbooks, and original and specific didactic material both in constructing a new approach to music teaching in Catalonia and in promoting and enhancing Catalan identity and culture in the 1970s and 80s. The influence of the Ireneu Segarra method on modernising music teaching was enormous at the end of the Franco years and in later decades, beyond the strict or loose implementation of the method in primary education or EGB. This can be seen in the production of school books and materials for music teaching published under the name of the method, which shall be analysed herein.

The original school textbooks and didactic material published on the method and distributed across eight different school years or grades are looked at in this article. Each grade has a teacher's book *Iniciació a la Música* [getting started with music] and a pupil's book *El meu llibre de músic* [my music book], as well as four series of worksheets and two songbooks with the title *Juguem cantant* [let's sing and play]. Our analysis focuses on the pedagogical and musical characteristics of the textbooks and materials, as well as their identity signifiers linked to Catalan culture and language.

The sources used to undertake the study include the aforementioned published textbooks and didactic material, EPM-MIS documents from the Musical Archive

[1] See: J. Cortina, *L'Escola de Pedagogia Musical-Mètode Ireneu Segarra*, in *Ireneu Segarra. Mig segle de mestratge musical*, Barcelona, Publicacions de l'Abadia de Montserrat (Biblioteca Serra D'Or, 206), 1998, pp. 57-59; J. Garrigosa, *L'Escola de Pedagogia Musical-Mètode Ireneu Segarra*, «Perspectiva escolar», vol. 155, 1991, pp. 16-19; Ll. Gelabert, X. Motilla, *Aproximación al movimiento de renovación de la práctica educativa a través de la Escuela de Pedagogía Musical-Método Ireneu Segarra*, in S. González, J. Meda, X. Motilla, L. Pomante (edd.), *La práctica educativa. Historia, memoria y patrimonio*, Salamanca, FahrenHouse, 2018, pp. 573-582.

at the Abbey of Montserrat and secondary sources on the EPM-MIS and its work over the years in promoting the Ireneu Segarra method. With regard to the latter, there are currently few published works: commemorative publications, work by some of the main stakeholders involved in its development and recent works on specific aspects about the EPM-MIS's early years and methodological impact on modernising musical pedagogy outside Catalonia[2].

The article is structured into three broad sections that intend to firstly provide readers with a brief, succinct, contextual review of the main legislative milestones for obligatory education in the years when the Ireneu Segarra method was introduced, and textbooks and didactic material were published for use in schools; then, it looks at the Ireneu Segarra musical-pedagogical method and the EPM-MIS in its early years to assess its impact on modernising music teaching in Catalonia; finally, it provides an analysis of the textbooks and didactic material published for use in schools across the different years of primary education or EGB.

1. *The General Education Act (1970) and music teaching in General Basic Education*

The General Education Act (LGE) from 1970 intended to implement a new education system that was fairer, more effective and in line with social aspirations of the time[3], as stated in its drafting. Nonetheless, the new act saw major controversy during its development, enactment and subsequent implementation process. Many professionals have agreed that despite everything, the LGE represented a tipping point in the development of the Spanish education system. It is likely, however, that change did not occur instantly since prior education

[2] See: Escola de Pedagogia Musical-Mètode Ireneu Segarra, *Opuscle commemoratiu dels 10 anys de l'Escola de Pedagogia Musical*, Barcelona, Patronat Pro-Música, Fundació Güell, 1983; Garrigosa, *L'Escola de Pedagogia Musical-Mètode Ireneu Segarra*, cit., pp. 16-19; J. Miranda, *El mètode Ireneu Segarra i l'Escola de Pedagogía Musical*, in *Primer Congrés de Música de Catalunya*, Barcelona, Consell Català de la Música (Conference Papers from the congress organised by the Catalan Music Council), 1999, pp. 299-303; Cortina, *L'Escola de Pedagogia Musical-Mètode Ireneu Segarra*, cit., pp. 57-59; Gelabert, Motilla, *Aproximación al movimiento de renovación de la práctica educativa a través de la Escuela de Pedagogía Musical-Método Ireneu Segarra*, cit., pp. 573-582; Ll. Gelabert, X. Motilla, *Renovación de la enseñanza de la música e identidad catalana en los inicios de la Escuela de Pedagogía Musical-Método Ireneu Segarra*, in X.M. Cid, M.V. Carrera (edd.), *XX Coloquio Historia de la Educación, Identidades, Internacionalismo, Pacifismo y Educación (s. XIX y XX)*, Ourense, SEDHE, Deputación de Ourense, 2019, pp. 261-266; Ll. Gelabert, *Aproximación histórica y metodológica a los cursos de pedagogía musical de la Universitat de les Illes Balears (1977-1990)*, «Historia de la Educación. Revista Interuniversitaria», vol. 34, 2015, pp. 337-356.

[3] *Act 14/1970 of 4th August, General Education and Financing Educational Reform*, «Boletín Oficial del Estado» (BOE), n. 187, 6th August 1970, pp. 12525-12546.

policy measures and shifts in direction had rendered the 1960s a tribute to the developmentalist approach, where education played a fundamental role[4].

One of the main foundations underpinning the LGE was the introduction of a common obligatory education period lasting eight years, from the ages of six to fourteen – the so-called General Basic Education or EGB – which intended to dismantle an unacceptable system that condemned the majority of pupils to poor primary education that was detached from higher levels, with only the minority of pupils benefitting from elitist middle and higher education. The overarching legislative goal was to break down a dualistic structure where primary education was practically ring-fenced from the rest of the education system and directed mainly at the working classes, and where middle and higher education 'belonged' to the middle and upper classes and was only provided to a minority of pupils. In the new legislation, the new system was deemed as the way to end «con cualquier discriminación» [any discrimination] and represented «la base indispensable de igualdad de oportunidades educativas» [the essential basis for equal educational opportunities]. Nevertheless, the aspiration for a new, single and non-discriminatory procedure (eliminating selective testing and the introduction of continuous assessment of schooling performance) would not enjoy straightforward implementation and, unfortunately, be soon impaired and altered by educational practice[5].

The LGE opened by alluding to the need to provide educational opportunities to the people in order to make the right to education for all fully effective[6]. In this sense, and alongside attempting to make obligatory schooling effective, the act aspired to overcome the deficit in school places that had lasted for over 100 years[7].

With regard to the education received during EGB, it was now linked to a terminology that attempted to clearly evince a change in direction of the educational model. This stated that it was aimed at acquiring, developing and functionally using the instrumental habits and techniques of learning; exercising the abilities of imagination, observation and reflection; developing aptitudes for co-existence; invigorating a sense of belonging to the local, national and international community; constituting an introduction to aesthetic and artistic appreciation and expression, and at developing a civic and social perspective and physical and sports ability. Moreover, the didactic methods aimed to stimulate originality and creativity amongst pupils, as well as develop aptitudes

[4] See M. de Puelles, *Tecnocracia y política en la reforma educativa de 1970*, «Revista de Educación», special edition (*La Ley General de Educación veinte años después*), 1992, pp. 13-29.

[5] *Ibid*., p. 25.

[6] *Act 14/1970 of 4th August, General Education and Financing Educational Reform*, cit.

[7] M. de Puelles, *Evolución de la educación en España durante el franquismo*, in A. Tiana, G. Ossenbach, F. Sanz (edd.), *Historia de la Educación. Edad Contemporánea*, Madrid, UNED, 2002, p. 342.

and skills in cooperation through teamwork with teachers and other pupils. In addition, audiovisual tools were to be widely used[8].

The new educational paradigm promoted by the LGE included – as stated in Order of 2nd December 1970 approving the Pedagogical Guidelines for EGB – an ambitious music training plan aimed at this educational stage. Based on the premise of comprehensive individual learning, music education was initially included in the Dynamic Expression area alongside other disciplines: movement, rhythm, bodily expression, mime, drama, games, P.E. and sports. The regulations set out a clear link between all the aforementioned aspects that were especially important in the first stage of EGB and associated with psychomotor development, intentional mastery of perception, attention, curiosity and sensitivity, as well as encouraging spontaneity, expressiveness, naturalness and creativity. Furthermore, the different musical parameters to be worked on throughout the educational period were stated, aimed not merely at theoretical knowledge of different music elements but rather at sensory experience to enrich pupils' imagination and personalities: song as an essential element of the music education process based on simple melodies, marches, and popular songs from each region performed as a group; listening to music and contact with the great universal works of music so as to distinguish voices and instruments, composers and periods, and encouraging attendance at concerts; reading and writing music as a way to understand and master song and compositions, and finally, boosting spontaneity, naturalness and creativity. As a methodological suggestion, the same section mentions proposals by authors such as Orff or Kodály[9]. The reference to these authors is not merely incidental, especially taking into account Kodály's methodological pillars comprising the main sources of inspiration for Ireneu Segarra to create his method. Although this will be looked at in later sections, the connections between Segarra and Kodály point to similarities and methodological complicity in line with the basic tenets of the new legislation.

The specific objectives for music education – included in the Dynamic Expression area – in the Pedagogical Guidelines and qualifying what has already been stated include: developing aural and artistic sensitivity; developing attitudes for music appreciation; contact with important works of music; an ability to repeat known rhythms; an ability to compose music; an ability to distinguish and compare voices, instruments and types of musical activity; skills in playing a musical instrument; an ability to perform music, and the capacity to improvise.

[8] *Act 14/1970 of 4th August, General Education and Financing Educational Reform*, cit.

[9] Ministerio de Educación y Ciencia, *Orientaciones Pedagógicas para la Educación General Básica (Año académico 1970-1971) Planes y programes de estudio*, «Enseñanza media», n. 225, pp. 1-116, <http://hdl.handle.net/11162/74229> (last access: 02.11.2019).

There is also specific content for each stage of education over the eight years of EGB[10]. As an overview, the first two years cover a general sensibility in different music parameters to specific work on each of them: interpreting feelings and thoughts through pantomime or rhythmic movement; improvising simple music pieces; prosodic and rhythmic precision; singing games and songs with movement; rhythms associated with movement (marching, running, jumping, etc.); popular simple dances; reacting to changes in rhythm and tone; rhythmic improvisation when faced with natural or instrumental stimuli; instrumental accompaniment; recognising and performing simple melodies and songs; recognising common instruments by sight and sound; creating rhythms and melodies; recognising steps, accents, beats and rhythm; the value of tempos in a song or group dance, and singing and role-play, etc. In the third year, an introduction to elemental musical forms is proposed (lied, canon, rondo), reading music, and personal solo and group performance of rhythmic or dynamic movements. From four to eight year continue to work on rhythm also linked to movement and dance, as well as song performances and further stressing choral singing and performance with different voices. These are joined by conducting simple melodies; composing melodies; an introduction to recorders; music and dramatization; new elements of musical language; instrumental groups; listening to and analysing music; reading music by tune and rhythm; instrumental group formats; more complex forms of music; appreciating the musical culture of other nations; knowledge about great performances and universal composers, and, finally, harmonising melodies.

In 1981, Royal Decree of 9th January set the minimal teaching for the initial EGB cycle, followed by Ministerial Order of 17th January[11], which set out the content and teaching at pre-school and early education stages. The provisions included the structure of EGB cycles; the minimum mandatory teaching for pupils at early stages; the times for each of the educational areas; coordination of pre-school education with the early education cycle; assessment methods; references to manuals and didactic material; the time given over to each subject, and how to organise support and revision activities, etc. These Renewed Programmes represented a second development of the previously seen Pedagogical Guidelines. For the first time, they included Artistic Education in the syllabus covering art, music and drama. Later provisions laid down the music content in a systematised and sequenced manner, with ambitious content that represented a qualitative leap over previous legislation.

Music education was structured into four thematic blocks: aural education, rhythmic training, voice training and instrument training. The

10 *Ibid*., pp. 86-90.

11 *Royal Decree 69/1981 of 9th January*, «Boletín Oficial del Estado» (BOE), n. 15, 17th January 1981, pp. 1096-1098 and *Ministerial Order of 17th January 1981*, «Boletín Oficial del Estado» (BOE), n. 18, 21st January 1981, pp. 1384-1389.

Renewed Programmes for the middle cycle came into force in 1982[12], setting out the minimum instruction aimed at boosting creative freedom, fomenting research habits and developing the child's imagination. They also included consolidating basic expressive resources acquired during the previous cycle by developing sound and rhythm perception and discrimination; becoming aware of the body and its movement in space; and securing patterns through graphic and artistic expression, contributing to the maturation process of said expressive abilities.

With schooling not having previously included music, both the Pedagogical Guidelines and the later Renewed Programmes intended to make this specific training a cross-cutting and hugely important element throughout the pupil's learning pathway. The intended approach was to be a gradual process that brought together content and proposals covering musical sensitivity and contact through experience and practice in pre-school and the early education cycle of EGB, moving on to improvisation and harmonic and compositional practice at higher levels. Through all of this, pupils were to be the epicentre of the educational process, with a focus on the concerns and interests inherent to their developmental stage. In turn, both the methodological approaches and the objectives and content included in the reform should be underscored as they were clearly in line with the active learning approaches proposed by benchmark European authors at the vanguard of pedagogy and music.

Nevertheless, this great leap forward set out in the new legislative context was not reflected in reality at schools. Indeed, its application and implementation were practically non-existent. This was due to the lack of musical training amongst EGB teachers and the inability of educational institutions to take measures in this regard. In short, it was an ambitious proposal that was difficult to implement. In this light, it is important to mention the innovative contribution made in Catalonia by Ireneu Segarra and the EPM-MIS with regard to training teachers and producing didactic manuals and material adapted to the new scenario, which will be analysed below.

2. *The modernisation of music education in Catalonia in the 1970s and 80s: the Ireneu Segarra method and the beginnings of the School of musical pedagogy*

As Ireneu Segarra himself stated[13] in a commemorative text on the first ten years of the EPM, the so-called Ireneu Segarra method came about from

[12] *Ministerial Order of 6th May 1982*, «Boletín Oficial del Estado» (BOE), n. 115, 12th May 1982, pp. 12574-12586.

[13] There are currently several works about the Ireneu Segarra i Malla (1917-2005). See: G.

a commission he received to design a syllabus that would later be arranged into broader proposals, a request he received from several teachers who were interested in modernising music teaching in Catalonia in the early years of the LGE's implementation. The programme was not an expression of his own ideas or there to provide original guidelines; the driving force was rather to provide for the acquisition of musical language by adapting it to the age of the child. The method included learning the basic notions of the relationship between sounds, knowledge on great musical literature, and a detailed study of popular Catalan songs which served as a basis to and articulated the entire programme. Children were progressively introduced to the different subjects they had to study at higher levels: reading, analysis, transport, harmony, accompaniment, improvisation, choirs and orchestras, conducting, composition[14].

The Ireneu Segarra method would be arranged into different material spread over eight years or grades – a task that Segarra himself would undertake over a twenty-year period. According to S. Riera, the method is not a work of music theorisation: it is based on a very specific approach to music education and sets out master principles or ideas and working procedures that define and characterise it. Many of its principles are inherent to general pedagogy or formulations of other great musical pedagogues. Its coherence and originality come from interlinking material, its broad development and the practical application in the material for an eight-year period[15].

The fact that the Ireneu Segarra method focuses its approach to music teaching through popular Catalan songs is worth special mention. In this regard, making it a central element of the method was hugely important. This is due to two reasons: firstly, the huge influence the pedagogical legacy of Z. Kodály had across Europe at the time and, secondly, its avowal of Catalan culture and language. The great work undertaken by B. Bartók and Z. Kodály in the early

Estrada, *Ireneu (Jesús) Segarra i Malla*, «Antics Escolans de Montserrat. Full d'Informació», vol. 10, 1977; J. Molas, *Entrevista amb el P. Ireneu Segarra, director de l'Escolania*, «Butlletí del Santuari», vol. 2, 1982, pp. 12-16; J. Comellas, *Ireneu Segarra: el sacerdoci de la música i la pedagogia musical*, «Revista Musical Catalana», vol. 47, 1988, pp. 37-43; Z. Sardà, *Viure la música a Montserrat. El pare Ireneu Segarra*, «Serra d'Or», vol. 403-404, 1993, pp. 25-29; J. Casals, *El método Ireneu Segarra*, «Música y Educación. Revista trimestral de pedagogía musical», vol. 16, 1993; J. Vives, *Ireneu Segarra*, «Catalònia Culture», vol. 41, 1995, pp. 34-37; *Ireneu Segarra. Mig segle de mestratge musical*, Barcelona, Publicacions de l'Abadia de Montserrat (Biblioteca Serra D'Or, 206), 1998; N. Bosch, *Entrevista amb el pare Ireneu Segarra, ex-director de l'Escolania de Montserrat*, «Alimara. Revista de Pensament Cristià», vol. 74, 2000-2001, pp. 7-8 and pp. 51-74; I. Segarra, *Quaranta-cinc anys de director de l'Escolania de Montserrat*, Barcelona, Publicacions de l'Abadia de Montserrat (Biblioteca Serra D'Or), 2000; I. Segarra, *Els concerts a l'estranger de l'Escolania de Montserrat (1982-1995)*, Barcelona, Abadia de Montserrat (Biblioteca Serra D'Or), 2001.

[14] Escola de Pedagogia Musical-Mètode Ireneu Segarra, *Opuscle commemoratiu dels 10 anys de l'Escola de Pedagogia Musical*, cit., p. 5.

[15] S. Riera, *L'aportació pedagògica*, in *Ireneu Segarra. Mig segle de mestratge musical*, Barcelona, Publicacions de l'Abadia de Montserrat (Biblioteca Serra D'Or, 206), 1998, pp. 48-49.

20th century in compiling and analysing Hungarian folk songs is well known. The classification was carried out based on musical parameters such as tone, mode or type/theme. Kodály believed that short, simple forms, pentatonicism and simple language (all features of popular Hungarian songs) were the essential elements for good pedagogy that was suitably for use with children. He proposed the introduction of Hungarian folk music from early school years (deeming that the children should learn music in their mother tongue, before foreign music, in the same way that they naturally learn their own language before other foreign languages) to later add works from great composers in the history of music. Through this, Kodály returned the legacy of Hungarian music to its people, raising it up to first-order musical literature. Based on an exhaustive analysis of this method, Ireneu Segarra visualised through Kodály's methodology a clear application for the situation in Catalonia. Although Catalan popular and folk music did not have a repertoire with such flexible features to provide a neat sequentiality for levels of difficulty (in line with Kodály's approach to Hungarian songs), Segarra took on the essence of the method and introduced Catalan songs at those levels where their characteristics allowed it, using the knowledge he had of Joan Amades' songbook or material published by the Popular Catalan Songbook institute. In contrast, he did not have useful songs for initial levels. Therefore, one of the great contributions of Segarra's method was his collection of songs specifically composed for early school years, all in Catalan, with recurrent themes for this age range (animals, crafts, silliness, etc.), sequenced from lower to higher difficulty level and always based on the pentatonic scale[16].

In the first four grades, the main aspects of the musical pedagogy method, as underlined by J. Casals and S. Riera[17], are: the concept of music as an expression of life and communication at an artistic level, presented as a source of joy and beauty adapted to the age, capacity and necessity of each individual; song as the first and most important musical vehicle and basis for artistic expression based on a text-intonation duality; the presence of traditional Catalan songs; the correct training and development of the voice; sensorial work perceived as what precedes and accompanies all learning; the importance of the imitation-recognition-reproduction process in early stages; inner ear training as a way to imagine and mentally represent sound impressions, and intimately linked to sensitivity; each new element studied should be extracted from a previously practised and assimilated piece of music; the importance of listening; the concept of studying musical language as a whole – sound, rhythm and melody relationships in different musical contexts such as major and minor tonality,

16 Gelabert, Motilla, *Renovación de la enseñanza de la música e identidad catalana en los inicios de la Escuela de Pedagogía Musical-Método Ireneu Segarra*, cit., pp. 261-266.

17 Casals, *El método Ireneu Segarra*, cit., pp. 51-74; Riera, *L'aportació pedagògica*, cit., 1998, pp. 48-55.

pentatonic scale, modes and atonality – and not solely linked to past concepts basically focused on repetition, scoring and theorising musical elements; the relevance of overexposure to musical elements; encouraging creativity; theoretical formulation conceived as a conclusion and not a starting point; creation and improvisation as elements that stimulate inventiveness and help in the discovery of the multiple possibilities of sound, and the assimilation of elements of musical language. In turn, some of the aspects or procedures worked on in the first four years would take on a new dimension in years five to eight, becoming progressively more complex: memory as retention and the uptake speed as key elements to understanding music; dictation as a smart translation practice for sound impressions in specific situations, identifiable in symbols and likely to be reinterpreted; the need to boost improvisation by incorporating new elements and procedures, as well as motivations arising from the study and analysis of works; studying harmony as musical syntax and an internal dynamic of discourse through listening practice and analysis, and in musical scores, as well as producing a second voice on the basis of basic harmonic functions; studying the textures and internal behaviour or music; developing creative practices; opening up to new cultures; a focus on different individual work skills and rhythms amongst pupils, and placing importance on tutorial work.

The EPM-MIS was created in 1973 with the main aim and purpose of spreading the methodology designed by Ireneu Segarra and promoting its use in schools to contribute to the standardisation of music teaching in Catalonia. The institute was founded as a working group under the supervision of Ireneu Segarra himself, who would dedicate his time to research and arrangement of material, producing and experimenting with a training programme for early childhood education (pre-school) and obligatory primary education (EGB), and later for music schools and conservatoires; this was done with a view to contributing a new perspective on music teaching and learning processes[18]. It offered training for teachers in order to supplement their initial training. From the beginning, it would focus on music teacher training at both pre-school and EGB levels. In addition to a common course for each that set out the theory and practical aspects regarding the content and procedures for music teaching in line with the method, it offered three courses aimed at pre-school teachers to train them for this stage, and four courses for EGB teachers. The three specific courses for pre-school teachers worked successively on theoretical and practical aspects of the content for early childhood music education (course one), the practical application of the content from the previous course and research into materials and didactic resources (course two) and, finally, programming aspects and music assessment in early childhood education

[18] Escola de Pedagogia Musical-Mètode Ireneu Segarra, *Opuscle commemoratiu dels 10 anys de l'Escola de Pedagogia Musical*, cit., p. 6.

(course three). In turn, the four specific courses on the method's use in EGB successively worked on the content to be covered and the methodology to be used in the first two years of this stage of education (method course one), followed by years two and three of this stage (method course two), years five and six (method course three), and years seven and eight (method course four). In addition to the methodological section, both the early childhood and EGB teacher training courses had common subjects (such as songs, voice training, solfeggio, choir singing and listening) and specific subjects depending on the course (such as sensory education in the introductory course, the three pre-school courses and the first two method courses for EGB; song analysis in the third method course; and harmony and composition in the third and fourth method course). The work plan for each course was supplemented by different sessions on psycho-pedagogical aspects and dance sessions. In addition to the aforementioned courses which ran in summer, over several weekends at Christmas and during Easter Week, there would be meetings held as a course continuation. These gatherings would be a place to share the experiences and work done by teachers during the school year on the one hand, and to look further into aspects from the summer courses, on the other. Ten years after its foundation, and thanks to the experimentation undertaken over this period, the institute planned to widen training in the Ireneu Segarra method to music teachers at music schools and conservatoires, since it was believed that these schools could apply the method more widely and more in-depth[19].

Driven to modernise music education in schools during these years, the EPM-MIS would, in addition to the aforementioned teacher training (an area we intend to look at more in-depth in future studies), publish school textbooks and specific didactic material for the method. This material was designed for use in different years in pre-school and EGB education in Catalonia under the framework of the LGE (and will be analysed below). Other books and materials would be published later for use in music schools and conservatoires.

3. *School textbooks and didactic material from the School of musical pedagogy – Ireneu Segarra method:* Juguem cantant *and* El meu llibre de música

As stated, in addition to the training courses for conservatoire teachers, one of the key elements that have contributed to the spread and implementation of the method designed by Ireneu Segarra is the publications promoted through the EPM-MIS. This material was produced based on the methodological

[19] *Ibid*., pp. 12-13.

guidelines put forward by Segarra in collaboration with his direct followers. The first publication was a song compilation, *Juguem cantant*, followed by the eight grades of *El meu llibre de música* for the eight years of EGB; this would be supplemented by four series of worksheets. In the same vein, and alongside the textbooks for the eight grades, *Iniciació a la Música* was also released that contained teacher guidelines on how to correctly use the activities[20].

These initial publications contained sequenced content aimed at solid training in music education based on the aforementioned parameters covered by the method. The sequencing for higher years included harmonic practice and an approach to composition technique, as well as reading music and knowledge of a wide repertoire of Catalan songs and other representative works of universal music. Nevertheless, these publications underwent major amendments in later editions with a view to adapting them to the reality in schools; a reality that in the best of cases dedicated an hour to music per week. This allotted time was completely insufficient to achieve the aims of the author's original method. Along these lines, it should be stated that Segarra's proposal – in line with Kodály's method used in Hungary at the time and a referent for the author – was designed for daily music practice at schools.

The first publication from Ireneu Segarra and the EPM-MIS was the *Juguem cantant* songbook. This collection comprised 50 melodies adapted to initial music education at EGB level. It also represented the culmination of a huge preparatory project developed by Ireneu Segarra and aimed at teachers and pedagogues who, at the time, did not have a suitable repertoire of songs for EGB-age children. It should be underlined that they were ad hoc melodies composed by Segarra, based on texts by Francesc Bofill, Antoni Puig and Francesc Serrat, and aimed to generate progressive work adapted to different levels of difficulty

[20] See: *Juguem Cantant. 50 cançons per a la iniciació musical* (Music: I. Segarra; Illustrations: J. Redorta; Texts: F. Bofill, A. Puig, F. Serrat), Barcelona, Publicacions de l'Abadia de Montserrat (PAMSA), 1973 (1st ed.); I. Segarra, *El meu llibre de música. Primer Grau*, Barcelona, PAMSA, 1983; Id., *El meu llibre de música. Segon Grau*, Barcelona, PAMSA, 1981; Id., *El meu llibre de música. Tercer Grau*, Barcelona, PAMSA, 1983; Id., *El meu llibre de música. Quart Grau*, Barcelona, PAMSA, 1984; Id., *El meu llibre de música. Cinquè Grau*, Barcelona, PAMSA, 1986; Id., *El meu llibre de música. Sisè Grau*, Barcelona, PAMSA, 1989; Id., *El meu llibre de música. Setè Grau*, Barcelona, PAMSA, 1993; Id., *El meu llibre de música. Vuitè Grau*, Barcelona, PAMSA, 1993; Id., *Iniciació a la Música. Llibre del Professor. I Grau*, Barcelona, PAMSA, 1974; Id., *40 fitxes de El meu llibre de música. Primer Grau*, Barcelona, PAMSA, 1976; Id., *30 fitxes de El meu llibre de música. Segon Grau*, Barcelona, PAMSA, 1981; Id., *27 fitxes de El meu llibre de música. Tercer Grau*, Barcelona, PAMSA, 1984; Id., *30 fitxes de El meu llibre de música. Quart Grau*, Barcelona, PAMSA, 1985; Id., *Iniciació a la Música. Llibre del Professor. II Grau*, Barcelona, PAMSA, 1977; Id., *Iniciació a la Música. Llibre del Professor. III Grau*, Barcelona, PAMSA, 1978; Id., *Iniciació a la Música. Llibre del Professor. IV Grau*, Barcelona, PAMSA, 1979; Id., *Iniciació a la Música. Llibre del Professor. V Grau*, Barcelona, PAMSA, 1983; Id., *Iniciació a la Música. Llibre del Professor. VI Grau*, Barcelona, PAMSA, 1989; Id., *Iniciació a la Música. Llibre del Professor. VII Grau*, Barcelona, PAMSA, 1990; Id., *Iniciació a la Música. Llibre del Professor. VIII Grau*, Barcelona, PAMSA, 1994.

– in line with Kodály's approach – and in Catalan. The difference between the two folklores, Hungarian and Catalan, was, as has been stated, the inherent pentatonic scale of the former which was not a general feature of the latter. Due to their lack of semitones, pentatonic songs are an easy-to-implement and interpret element for young children. Although this considerably restricts the melodic variety, it does aide quick learning and the possibility to accompany the melodies with instruments played by the pupils themselves.

The author highlights the important role of the teacher throughout the process in the prologue. The results will largely depend on their level of musical and pedagogical skill, and in-depth knowledge of the material they are using. This material was designed for progressive use of the songs following the order proposed by the author and based on interesting melodies and words for pupils. Aware of the features of children's songs, the works have recurring themes linked to animals, the seasons of the year, crafts, daily routines and funny characters. Segarra also sets out pedagogical guidelines to get the most out of them: following the order of the songs that matches the order of pedagogical knowledge; learning them by heart, using relative solfeggio and setting the beat; giving the right time and dynamic to each, as required by the lyrics or the music; singing and moving the body (playing, dancing or doing choreography); using resources that provide variety to presentation (Q&As, soloist and choir, echoes, using hands, etc.), and incorporating pentatonic musical accompaniment, preferably with Orff instruments[21].

The sequencing of song difficulty in the book begins with the G-E interval and carries on by incorporating the remaining notes on the pentatonic scale, with songs adapted to each new element, coming to a crescendo of difficulty surpassing a single octave.

Although the *Juguem cantant* songbook sets out the working basis for the method designed by Ireneu Segarra, the high acceptance and spread of his ideas rapidly led to the need for specific didactic material to complement the songs in the book for an ever-larger group of teachers and musicians. The release of the second grade *El meu llibre de música* book in 1981 culminated and solidified the method adapted to EGB schooling years and grades. The first publication coincided with the approval of the Renewed Programmes of the LGE in the same year, which extended and specified the Pedagogical Guidelines in the form of didactic content and instructions to implement music education at schools.

With regard to pedagogical procedures, the author proposes: an initial separate study of rhythm (linked to movement), intonation (starting with the simplest interval relationships) and reading (learning symbols as a result of real sound); the use of the pentatonic scale as an initial step to studying interval relationships; the use of absolute solfeggio and solmisation or relative solfeggio to help learn tone and sense, and polyphony and polyrhythm to understand

[21] Segarra, *Advertiment*, in *Juguem Cantant. 50 cançons per a la iniciació musical*, cit., pp. 3-4.

the harmony and counterpoint process. It also includes a further level of realisation with an assortment of didactic resources throughout the different levels such as: practising ostinatos as a prior step to polyrhythm; working on rhythmic and melodic series to help precision and the inner ear; using rhythmic and melodic bills to practise reading and memory; practising imitation and recognising melodies and rhythms before moving on to reading and dictation; using phonomimic gestures to indicate the highness of notes and working on intonation, inner ear, polyphony and modulation; practising writing with abbreviations and rhythm before using the stave; using the ark of studies as a visual repository of the melodic material learnt, and the tabletop and wall stave to help relative reading, as well as dictations and creating melodies, and using special terms for accidentals, etc.

These proposals set out objectives and methodological lines that are in tune with the Pedagogical Guidelines and later Renewed Programmes approved within the framework of the LGE which were looked at earlier. Nevertheless, there is a notable difference with regard to content level and sequencing throughout the different levels. Although both proposals are ambitious in both form and substance, the Ireneu Segarra method posits highly difficult concepts in the higher levels that are difficult to absorb in the learning space for music teaching as stipulated by the legislation.

The five thematic blocks in the first and second year are: melody, rhythm, voice training, reading music and songs. The third and fourth years include melody supplemented by an introduction to harmony and rhythm. Voice training and reading music disappear as thematic blocks, although they will continue to be worked on in a cross-cutting way in the other thematic blocks and levels. Levels five, six and seven continue working on melody, harmony and rhythm, and include musical analysis. The fifth year looks at melody analysis, the sixth at analysis and one-part, two-part and three-part songs, and the seventh at song and aural analysis. Year eight works on the principles of harmony and counterpoint, accompaniment and improvisation, musical forms and contemporary music.

There are recurrent pedagogical elements throughout the first four grades of the Segarra method, such as the use of phonomimic gestures and solmisation, rhythm and body work, repetitions, echoes, and melodic and rhythmic improvisations. In terms of song, it proposes sequenced melody work based on the pentatonic scale in the first and second year to then move on to diatonic and modes in later years. The songs used in the first two years are those in the *Juguem cantant* songbook created by the author. Popular Catalan songs appear from the second year, which are used to work on more complex musical elements. From here and in later grades, new melodies are also introduced that are representative of old, universal music.

In the prologue to the teacher's book for the fourth grade, the author refers to the high aggregate level in the first three years enabling pupils to easily read

any score, intelligently study it for performance – either sung or with a musical instrument – and the understanding of any work of music heard. It then justifies the need to continue practising harmony aimed at musical accompaniment and knowledge of the great legacy of early to contemporary music[22].

The didactic content and strategies of the Ireneu Segarra method in the first four grades demonstrate a high level of musical complexity. Although the Renewed Programmes included an introduction to practising harmony in higher years aimed especially at accompanying songs with elemental forms of instrumentation (drone, bourdon, ostinato, fundamental chords, illustrative sound effects, etc.) and an introduction to musical forms such as canon and rondo, in no way did this content come close to Segarra's aspirations. Indeed, the content of the first four grades proposed by the author, adding specific elements from the rest, attains a level similar to the eight years set out in the legislative framework.

The methodological similarities between the proposals in the Pedagogical Guidelines and Renewed Programmes, and those made by Segarra, stand out for being all in tune with Kodály's tenets. The proposals are based on experience; sensory and motor work; discovering musical abstraction through the inner ear, improvisation and creativity; knowledge of universal music; practising instruments, and the use of the voice and song as pillars for music education. In this sense, Segarra focuses his approach around popular, traditional Catalan song and makes it the leitmotif for most of the learning process.

Epilogue

As a recap and a preview to findings, we can state that the Ireneu Segarra method promoted by the EPM-MIS and the school textbooks and specific didactic material represented a major modernisation of music pedagogy discourse in the 1970s and 80s in Catalonia (connecting to Catalan cultural and linguistic reality), in line with the vanguard of European music education.

Despite the method's difficulty and complexity, and it being designed for a schooling model with daily music practice, its impact was notable on pre-school and EGB education levels through the use of the textbooks and didactic material for the method, as well as the training received by teachers who attended courses on the method at the EPM-MIS.

The influence of the Ireneu Segarra method on modernising music teaching was enormous in the final years of the Franco era and later decades, beyond the strict implementation (or otherwise) of the method in early childhood and primary education. This can be seen in the release of other books and school

[22] Segarra, *Iniciació a la Música. Llibre del Professor. IV Grau*, cit.

material designed for music teaching that were not strictly published under the banner of the method for school use.

In the specific case of the books published for use in schools analysed in this article (*Juguem cantant* and *El meu llibre de música*), the methodological similarities they have with the guidelines set out in the legislative framework should be underscored. In both instances, the proposals for sensory work and experience in line with the innovative pedagogy being promoted around Europe stand out, as do the recurrent drive for creativity and the discovery of musical abstraction. The common pedagogical tools in the initial grades of *El meu llibre de música* are the pentatonic scale as a tonal basis in initial songs, the use of phonomimic gestures, solmisation or relative solfeggio, rhythm and body work, etc.

Finally, the high complexity of the last four published levels should be highlighted; these were aimed more at teaching for higher music studies and meant that later editions, adapted by Segarra's followers, included redesigned content. The method's first four grades which were used most in obligatory primary education matched, more or less, the Pedagogical Guidelines of the LGE and the later Renewed Programmes. Both the legislation and the method designed by Ireneu Segarra offered a new framework of action and perspective with regard to the development of music practice in schools, although the reduced teaching hours set out in the regulations and the lack of specialised teachers made a more general implementation impossible. Nonetheless, thanks to its teacher training courses in the Segarra method, the EPM-MIS in Catalonia sowed the seeds to change a pedagogical inertia that remains to this day.

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A new source for the study of educational practices: competitive exams for school headteacher positions (Spain, 20th century)*

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ABSTRACT: In this article we present a new source for studying school practices in Spain during the 20th century. This source consists of the documents preserved from the competitive public exams for the position of school headteacher. We analyse the exams held in 1932 and under the Francoist regime. Among the elements common to all of them was the requirement that the candidates elaborate a report of their professional life. These reports, along with their supporting documents, provide us with abundant information about 20th century school culture. By presenting a variety of examples of descriptions of school practices from before and after the Civil War we are able to detect continuities in these practices. The article concludes with some explanations for these continuities.

KEYWORDS: Competitive public exams; School practices; School headteachers; Teacher archives; Spain; XXth Century.

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Introduction

Going back as long as can be remembered, there comes a rite of passage in the life of every Spanish teacher that marks his or her career. This ritual affects every teacher working in the public educational system as well as every professional in any part of the public sector who receives a salary from the State. It brings together teachers from all levels of education, from preschool to the university. The ritual consists of a candidate's knowledge and curriculum being tested and accredited by a commission or tribunal – generally made up of teachers from the same categories to which the candidate aspires, or to a higher one – which certifies the candidate's aptness to join this professional group. The ritual involves an intense process of selection where various individuals are vying for the same position, meaning that over time the number of people who have failed in the endeavour is enormous. But candidates who succeed go on to become civil servants for the State, with employment and salary assured for the remainder of their lives. The concrete form that this rite of passage takes is known in Spain as *oposiciones*, a term every Spaniard knows but which is not easy to explain to an international audience.

As a reader can well imagine, the design and content of these *oposiciones*, or competitive public examinations, have changed constantly since the time when Spain's public education system was first configured. The exams have always served as a mechanism used by the State to prepare groups of teachers capable of implementing the school reforms deemed necessary at different historical moments. In the case of Spain in particular, the notorious inability of different political forces to agree even minimally on matters of education has led to different governments using these *oposiciones* as a way of controlling the ideology and pedagogical style of potential teachers who would be working for the government, a manner of imposing a model more to the liking of those in power at a given time. From this perspective, these exams would seem to be a logical, attractive source for historians of education, providing a view into the more obscure workings driving educational policy. But in fact, nothing could be further from the truth. In 1988 professor Paulí Dávila called attention to the absence of research on competitive exams for schoolteachers, calling it a «historiographic taboo»[1], and the paucity of such investigations has been remarked upon in recent work[2]. Both the Archivo General de la Administración [General Archive of the Administration, AGA] and local archives possess abundant documentation relating to exams administered to prospective state schoolteachers. The AGA is also in possession of many files of

[1] P. Dávila, *Las oposiciones al magisterio y la normalización de los saberes pedagógicos*, «Revista de Educación», n. 286, 1988, p. 115.

[2] M.M. Requena Olmo, *Reflexiones en torno al sistema de oposiciones a la docencia primaria en España y las funciones éticas de los docentes*, «Cuestiones Pedagógicas», n. 18, 2006-2007, pp. 301-303.

exams for university teaching positions, for primary school inspectors and for headteachers of graded schools.

In this article we intend to focus on the latter type of *oposiciones*, those taken by candidates for school headteacher. The headteacher or principal's function in primary schools came into being with the organizational model implemented with the graded school at the start of the 20th century[3]. They were administered for the first time in 1898 in the practice schools annexed to the Escuelas Normales [Teacher Training Colleges], which were the first schools to have a headteacher. At this time Spain's larger cities saw a very gradual establishment of graded schools, either in buildings constructed expressly for the purpose or by the consolidation into one institution of various existing single-classroom schools. The result of this process was always the same: teachers who had up until this time worked completely independently in their own classroom were now part of a community, a cloister of teachers who were meant to work together harmoniously under the supervision of a school headteacher, who was now «the eye of power» of the graded school[4]. As Antonio Viñao put it, «why move to a graded school, if not to be headteacher?»[5]; if you were going to find yourself under the orders of a colleague with the same formation and professional trajectory as you, wasn't it preferable to be an autonomous teacher in a single-classroom school?

The way that the educational leadership of school headteachers was constructed is a topic about which scarcely any historical studies have been done anywhere[6]. It is virtually impossible to find research on the processes of their formation and selection, despite the fact that in practically all countries they played a crucial role as mediators between national educational reforms and the attitudes and expectations of teachers in response to these reforms. In Spain, an analysis of the appointments of school headteachers in Madrid between 1901 and 1936 shows that in most cases the educational administration chose to follow a strictly bureaucratic, seniority-based criteria. However, in some of the graded schools that sought to be more experimental, headteachers were chosen directly from among the teachers, with a preference for those with an excellent curriculum, with published articles and books, those who had trained abroad and enjoyed prestige among their colleagues and who had proven experience in educational leadership. The *oposiciones* system was not used

[3] A. Viñao Frago, *La Dirección escolar: un análisis genealógico y cultural*, in M. Fernández Enguita, M. Gutiérrez Sastre (edd.), *Organización escolar, profesión docente y entorno comunitario*, Madrid, Universidad Internacional de Andalucía/Ediciones Akal, 2005, pp. 44-51.

[4] M.M. del Pozo Andrés, *Historiografía sobre la escuela graduada: perspectivas internacionales*, in P.L. Moreno Martínez (ed.), *Educación, Historia y Sociedad. El legado historiográfico de Antonio Viñao*, Valencia, Tirant Humanidades, 2018, p. 190.

[5] A. Viñao Frago, *Innovación Pedagógica y Racionalidad Científica. La escuela graduada pública en España (1898-1936)*, Madrid, Akal, 1990, p. 49.

[6] K. Rousmaniere, *Historical perspectives on the principalship*, «Journal of Educational Administration and History», vol. 41, n. 3, 2009, pp. 215-216.

for selecting headteachers until 1926, when it was deemed necessary to fill the positions of the new graded schools being built under the «Plan of 1922». The procedure designed for these exams under the Royal Order of 17th September 1926 was quite unlike the classic exams administered for schoolteachers, which relied heavily on memorisation and rote knowledge. The new system required that candidates demonstrate their pedagogical aptitudes, their familiarity with graded teaching and their ability to design a teaching project. For the second exercise of this exam, each candidate was given the floor plan of a school building with which he or she had to formulate an organisational project for that graded school[7].

Subsequently, when in 1926 the competitive exam was established as the procedure (albeit not the only one) for attaining a position as headteacher, it became evident that the educational administration wished to select as headteachers those teachers with outstanding organisational skills. To this end, they called for a kind of documentation that provides us with much valuable information about the school culture of the time. Although this model of competitive exam was established under the dictatorship of the general Primo de Rivera, it was maintained during the Second Spanish Republic (1931-1939) and during Franco's dictatorship (1939-1975), until the passage of the Ley General de Educación [General Education Law] of 1970. Much of the documentation generated by these exams for headteacher positions is conserved in the AGA. The documents from the 1932 *oposiciones*, discovered and handled for the first time by one of the authors of this article[8], opened a line of research that has resulted in various publications in the last few years[9]. After analysing different files from exams held under the Second Republic and under Franco's dictatorship, the first question that we wish to pose in this paper is the following: What can these documents tell us about school practices at different stages of the 20th century?

[7] M.M. del Pozo Andrés, *Urbanismo y Educación. Política Educativa y Expansión Escolar en Madrid (1901-1931)*, Madrid, Servicio de Publicaciones de la Universidad de Alcalá, 1999, pp. 253-257.

[8] Ead., *Justa Freire o la pasión de educar. Biografía de una maestra atrapada en la historia de España (1896-1965)*, Barcelona, Octaedro, 2013, pp. 79-88.

[9] C. Menguiano Rodríguez, *Los expedientes-oposición a direcciones de escuelas graduadas de 1932 como fuente histórico-educativa. Un estudio de caso: el expediente-oposición de María Sánchez Arbós*, «Historia y Memoria de la Educación», n. 10, 2019, pp. 309-344; C. Menguiano Rodríguez, *Los expedientes de oposición como fuente histórico-educativa: modelos de archivo de vida*, «Revista Linhas», vol. 20, n. 44, 2019, pp. 14-27; G. Barceló Bauzà, F. Comas Rubí, B. Sureda García, *Abriendo la caja negra: la escuela pública española de postguerra*, «Revista de Educación», n. 371, 2016, pp. 61-82; G. Barceló Bauzà, F. Comas Rubí, M.M. del Pozo Andrés, *La práctica escolar durante los primeros años del franquismo*, «História da Educação», vol. 22, n. 54, 2018, pp. 334-357; G. Barceló Bauzà, S. Moll Bagur, B. Sureda García, *Imagen y práctica escolar en las memorias de oposición del franquismo: el caso de Baleares*, «Revista Linhas», vol. 20, n. 44, 2019, pp. 28-41.

Handling documents that involve a similar experience – competitive exams for the position of headteacher – at two very different, even antithetical historical moments as were the Second Republic and Franco's regime, allows us to scrutinise the hypothesis of continuity. The more recent educational historiography shows that there are certain continuities to be found between school practices under Franco and some of the curricular and methodological reform traditions used in Spain in the 1920s and 1930s. Antonio Viñao has shown how, as a result of the presence within Francoist pedagogical circles of inspectors, headteachers and teachers formed under the progressive pedagogy of the 20s and 30s, we can detect in the school syllabuses of 1938 a certain residue of these approaches and reformist discourses[10]. In a previous study of the application of the National Curriculum on Primary Teaching in 1953 we showed that during the 1940s and 1950s, certain school practices considered to be representative of pedagogical modernity in the 1930s lived on; after a proper ideological «cleansing», such practices persisted «as signs of modernity during Franco's dictatorship»[11]. Some Spanish educators who had been involved in the New Education movement prior to 1936 reappeared in pedagogical journals at the end of the 1950s expounding on experiments based on certain methodologies that «weren't so different from those used twenty-five years before: children's newspapers, arts and crafts workshops, school farms and gardens, projects, etc.»[12]. This leads us to pose a second question in this paper: is there evidence of similarities and continuities in the school practices described in the records of the competitive exams for school headteachers administered during the Second Republic and under Franco?

In the following paragraphs of this article we will analyse the *oposiciones* for school headteacher held in 1932, the first year for which we have documentation in the AGA; we will also look at all of the exams taken during the dictatorship and for which there are records in the same archive. An analysis of the information afforded by these materials will prove their importance as sources for the study of 20th century school practices.

10 A. Viñao Frago, *Politics, education and pedagogy: ruptures, continuities and discontinuities (Spain 1936-1939)*, «Paedagogica Historica», vol. 51, n. 4, 2015, pp. 407-408.

11 M.M. del Pozo Andrés, T. Rabazas Romero, *Políticas educativas y prácticas escolares: la aplicación de la Ley de Enseñanza Primaria de 1945 en las aulas*, «Bordón. Revista de Pedagogía», vol. 65, n. 4, 2013, pp. 128-129.

12 M.M. del Pozo Andrés, S. Braster, *El movimiento de la Escuela Nueva en la España franquista (España, 1936-1976): repudio, reconstrucción y recuerdo*, «Revista Brasileira de História da Educação», vol. 12, n. 3 (30), 2012, p. 31.

1. *Competitive public exams for the post of headteacher in 1932: life archives and school practices*

In December of 1932 a public competitive examination was announced for the position of headteacher of graded schools[13]. This was the first convocation of its kind held under the Second Spanish Republic (1931-1939), its objective being to fill the posts of 50 male and 50 female headteachers for graded schools of six or more grades. With these *oposiciones*, the Republic sought to promote those teachers who were most qualified and most committed to educational reform, in order that they might assume positions of leadership in the new graded schools; the goal was for these schools to function as centres of pedagogical renovation.

The peculiarity of the documentation presented[14] is closely related to the process of selection that was designed and used for the first time in this particular examination. Rules stipulated that, before undertaking a series of written and practical exercises, each candidate had to prepare a «report of their professional life», supported by any documents deemed to be of interest. What was exceptional and unprecedented about these *oposiciones* was the lack of any instruction or guideline whatsoever regarding this point; for this specific task, the aspiring headteachers were free to elaborate their reports as they saw fit. This freedom is reflected in the great variety of both the reports and the supporting documents. Requiring of candidates a report without guidelines or stipulations leads us to define this task as a «life archive practice»[15], one we would call «institutional»[16], and in which each teacher makes a selection of what he or she considers to be the narrative and documentary pieces that will best summarize their professional life. All of this took place in the context of a public competitive examination for which the candidates had to prepare the material beforehand, knowing that these reports were going to be evaluated by examining boards made up of renowned pedagogical authorities. For the aspiring headteacher, it was an opportunity to present their professional life and approach by means of the reproduction and appropriation of those

[13] «Gaceta de Madrid», n. 338, 3 December 1932, pp. 1609-1610; «Gaceta de Madrid», n. 26, 26 January 1933, pp. 633-634.

[14] A total of 287 dossiers were made available for study. The conserved sample represents teachers from nearly all Spanish provinces. The bulk of the documentation is housed at the AGA in Alcalá de Henares (Madrid), in the education section, boxes 32/10715-10722, 32/10740-10748 and 32/10767-68. Some loose samples were also found in the archives of the universities of Granada and Santiago de Compostela.

[15] A notion inspired by P. Artières, *Arquivar a Própia Vida*, «Revista de Estudos Históricos», vol. 11, n. 21, 1998, pp. 9-34.

[16] The «institutional life archive» emphasises the context in which this life archive is assembled. In these cases, the archive is put together for purposes of publicity and institutional evaluation. This fact influences the decisions made and the anticipation of the evaluator's judgement. These archives are different, therefore, from «private life archives», which are elaborated in a realm of intimacy.

practices and discourses that he or she deemed more forward-looking or more effective for portraying the model of an ideal teacher. The lack of instructions for this «life archive» resulted in a differing array of strategies; the considerable heterogeneity of reports and supporting documents thus comes as no surprise.

The variety of the candidates' reports of their career work touches every aspect: length, content, writing style, means of elaboration and presentation. The same is true of the supporting documents; although most of the candidates presented certificates and official reports to back up their reports, we also find numerous cases where they supplied a variety of other kinds of documents related to school practices including material elaborated by students, by the teachers themselves or in collaboration with others. The didactic and work materials include school notebooks; class diaries; syllabuses; paidological and graphic sheets; guidelines, inventories and pamphlets concerning a school's functioning or the educational activities taking place inside or outside of the school; photographs and postcards of all kinds; newspaper clippings and professional or school publications; institutional records concerning to school friendly societies, school colonies and field trips; unpublished pedagogical essays, etc.

Such documentary variety poses a challenge when it comes to classifying the files and dossiers. We chose to approach this challenge in the following manner: if we conceive of these dossiers as an institutional life archive practice, that is to say, as a deliberate selection of documents meant to represent a professional identity by means of school practices and discourses, then the way such a dossier is put together anticipates and projects the candidate's way of conceiving his or her professional life. We have identified three models of strategies which, while not exclusive, do allow us to classify the dossiers based on the type of reports and materials presented[17].

The first of these is what we call the «curricular-bureaucratic» model. The dossiers included in this model present one's professional trajectory as a collection of qualifications or merits, often recognized and accredited by a given authority. This type of file is defined by the candidate's silence; the task has in effect been delegated to persons or entities of greater authority. One consequence of this attitude is the shorter length of the reports presented, which in many cases consist of no more than a list of educational achievements, services performed, merits and certificates of diverse origins and levels. This type of dossier represents 23% of the total. Such reports are invariably brief – two sheets, typically – and tend to be written in an aseptic, third-person style. The certificates accompanying these reports are generally of two types: those certifying the completion of courses of advanced learning or specialized education – physical education, drawing, early childhood care, deaf-mute or

[17] These models were described for the first time in Menguiano, *Los expedientes de oposición como fuente histórico-educativa: modelos de archivo de vida*, cit., pp. 14-27.

blind education, didactic methods –, and laudatory certificates, especially those issued as a result of educational inspections. This last type of testimony is often considered to be a more truthful and valuable record of the teacher's work than the teacher's own testimony:

> This work is not, and cannot be, a Report of the school labour performed by the undersigned; the nature of the activity precludes its being put into words. But there is something that serves as a guarantee of sorts of the work carried out in the school: the instructions and reports of the inspector[18].

The copies and comments of laudatory reports and certificates are common in these reports, and stem from the lack of authority that the candidates attribute, voluntarily, to themselves. We see an example in the report of this teacher who, after alluding to his merits and work qualifications, writes:

> If I mention in this summary the existence of corroborative documentation it is because I believe that it will indicate more faithfully the results obtained from my professional life […] with the advantage that it relies not on my own criteria – which may be impassioned – but on that of the official social surrounding in which I work and that of those in charge of controlling it[19].

This bureaucratic-accreditational obsession, which sometimes obliges candidates to leave qualifications unmentioned simply because they cannot come up with documentary proof, contains a hidden, internal critique of the system of reports used in this selection process; candidates seem to think that they are incapable of providing useful or truthful information that will describe their professional profile. Subsequently, they conclude that their teaching work is best reflected in official reports and stamped documents and that they may as well dispense with anything that does not fit within this framework. This model of dossier shows us a way of presenting one's professional identity in which a teacher's work and classroom teaching practices are reduced to achievements that can be recognized, attested to and certified by other authorities.

These files allow us to discover which merits were considered relevant for defining a model of practical and professional identity that was subsidiary, administrative and bureaucratic, a restricted model to which Antonio Viñao gave the name «account of qualifications and services»[20]. Viñao has pointed out the usefulness of this type of autobiographical source for studying the process of professionalization of teacher training or the influence of the meritocracy principle in the self-perception of teachers subjected to these processes. However,

[18] J. Ortiz de Anda Guinea, *Resumen de la labor escolar*, Caja 32/10740, AGA, 1932.

[19] T. Láinez Gil, *Resumen de la labor profesional*, C. 32/10746, 1933. (Underlined in the original).

[20] A. Viñao Frago, *Las autobiografías, memorias y diarios como fuente histórico-educativa: tipología y usos*, «Sarmiento», n. 3, 1999, pp. 251-252.

dossiers of this sort offer little information about teaching practices inside or outside of the classroom, beyond the evaluations expressed by educational authorities in official documents.

The second model, which we call the «methodological-professional» model, describes the dossiers that deal fundamentally with school practices as they are seen by the candidate. This type of dossier, which accounts for 22% of the total, is characterised by a longer report and a more personal narrative. This is due to the fact that, for the most part, these dossiers expound on the organisation and teaching system used in the school where the teacher has worked, and they often include timetables, examples of lessons, the development of syllabuses ordered by grade and subject and by their different groupings, comments on methods that have been practised and the classification of students. Sometimes these reports are accompanied by samples of work done by the students, the best possible testimony of the teacher's daily activity in the classroom: «My work in this school may be judged by all that I have told in this report which is a faithful reflection of what we do, and by the accompanying work samples, done by some of the students»[21]. In some cases, these work samples or the teacher's lesson plan notebook are the central element of the dossier; there are candidates who consider that such documents are the best representation of their professional life: «Instead of talking about the methodology I used in different subjects, I have chosen to provide some of my students' practical exercises; these will help to show that teaching should be, to the extent possible, an eminently practical, active and experimental activity»[22].

The most notable feature of this type of dossier is the way that it presents the candidate's school practice as the true measure of his or her professional life. In many of these reports, the work done in prior positions is left unmentioned by the candidates, who focus only on the current or latest post where they are applying their most well-honed teaching system. A teacher from Málaga put it in these terms: «The teacher writing this believes that his current work summarises and condenses all that he has done over the course of his career, and that everything that came before belonged to a path of experiments and trials leading up to the what he is doing now, just as his current activity is a starting point for future endeavours. This is why he limits himself almost exclusively to the present work»[23].

The contents and objectives contained in these dossiers make them quite useful for studying school practices carried out by these teachers, in part because they tend to focus on their work in the classroom. And given that, as one teacher put it, «efficiency is found in modernisation»[24], candidates were

[21] V. Perero Páramo, *Resumen de la labor realizada en la enseñanza primaria*, C. 32/10721, AGA, 1933.

[22] C. Espinosa Lluesma, *Resumen de la labor profesional*, C. 32/10715, AGA, 1933.

[23] R. Verdier Vázquez, *Resumen de la labor profesional*, C. 32/10745, AGA, 1933.

[24] P. Del Santo Ángel, *Resumen de la labor profesional*, C. 32/10742, AGA, 1932.

wont to highlight those practices considered to be more innovative, describing the latest experiments applied in the classroom:

> Beginning this school year, in addition to the method of 'centres of interest' that we had been using, we have tried the project method, working on it three days a week; the girls seem to like it and are inspired by it. We worked on: the house we live in, our town, the fair, the post, means of locomotion and others. We have also gone on field trips and had special lessons and historical narrations that help bring out the influence of our surroundings and connect the school with daily life. Stories, poetry recitals, singing, film screenings and gramophone sessions all help to cultivate the girls' aesthetic sense[25].

It is also common for teachers to construct materials of their own in order to implement new methods:

> I made several of the Froebel's Gifts, 1º, 2º y 3º with elements that I was able to use with the help of considerable patience and ingenuity. With thick card I elaborated various series of numbers, upper and lower-case alphabets that imitated print-type, and others with sandpaper, which was recommended by Maria Montessori[26].

In other cases we find the experiments that teachers were implementing in their schools, which often had to do with the adoption of methods and organisational solutions, as is described in this report: «[The] establishment of a general assembly, along the lines of Winnetka, to address issues of student discipline and general behavioural questions, organised by the children themselves in the purest, democratic manner»[27].

Many of the texts include class routines and descriptions of the different methods and school practices used and which serve to analyse the comprehension of the New Education ideas as they were interpreted by the teachers, by means of a synthesis of different elements:

> The programs and methods are those of the Active School; [female] students receive the education that suits their needs, and their aptitudes and preferences are respected […] Subjects are grouped together and programs of ideas are associated; Centres of interest, object lessons and manual work. The best of Doctor Montessori, Dewey and Decroly. […] There is a centre of interest for each grade; we explain the lessons of things related to it and then we bring together all of the materials and manual work for these lessons. We speak with the girls, we explain the goal of the lesson, they observe it, we remind them of the ideas that are related to it or that can be used as a basis for the lesson. This conversation helps to instil in them the habit of discussing and expressing their judgement properly. They then write up a summary of their own, illustrating it with a motive from a print or a photograph,

[25] L. Fernández Sánchez, *Resumen de la labor profesional*, 07781/008, Archivo Universitario de Granada (AUG), 1933.

[26] L. Lafuente Navarro, *Resumen de la labor profesional*, C. 32/10745, AGA, 1933.

[27] F. Arribas Velilla, *Labor profesional*, C. 32/10746, AGA, 1933.

from the object itself if we have it, or from the blackboard (we spend as much time drawing as we do talking). We are quite confident of the educational value of intuition[28].

We can see therefore that the dossiers fashioned after this model provide valuable information about the most commonly used teaching practices of would-be school headteachers, allowing us to analyse the extent of their use as well as their appropriation, emphasis and development. They also provide us with information regarding the spaces and conditions in which these school practices were used, the interpretations made of them, and the reasons for choosing them.

The third model, which we call the «biographical-narrative» model, refers to the dossiers in which candidates narrate, generally in the first person, a sort of life-story in teaching. These make up 55% of the total and tend to constitute the longest and most personal of the reports. For the most part, their structure follows a similar pattern: a summary of the teacher's professional life becomes an autobiographical story of his or her experiences and tribulations, «from the first day of class up to the present, with all their ambitions, concerns, mistakes and rectifications»[29]. The teachers describe the activities and achievements that they consider most relevant and effective and likely to enhance their pedagogical profile. These accounts follow differing itineraries which, while often progressive, also include setbacks and criticisms. They also touch upon relationships with authorities, families, colleagues, etc. Insofar as they are life stories, they tend to go beyond the descriptions of school practices that we encountered in the methodological reports; the authors of this third type of report show us a broader vision of their experience, including social, political and ideological implications that are made more or less explicit. These writings often include reflections about pedagogical systems or ideas as well as critiques of teaching conditions and of an array of problems that the candidate considers relevant to his or her teaching work or to education more generally. The supporting documents accompanying these dossiers are varied: official and non-official reports and certificates, photographs, newspaper and professional journal articles, pedagogical essays, different kinds of publications, etc.

What stands out most about these reports is the teachers' need to write; in doing so, they seem to be rejecting the other two models as insufficient:

It is quite possible that in place of this report I could simply furnish a list of services and qualifications, certified by the Administrative Section, that already figures in the dossier. However, some aspects of the candidate's professional and social activity are not reflected

[28] E.C. Guerrero Puente, *Mi labor profesional*, C. 32/10720, AGA, 1933. (Underlined in the original).

[29] J.B. González Álvarez, *Resumen de la labor realizada en las escuelas*, C. 32/10747, AGA, 1933.

in the aforementioned document […] As a complement and extension to said document, the candidate provides here a brief summary of cultural work undertaken[30].

In composing these reports, candidates must assume the position of «historian»[31] of their own professional lives, and in adopting this type of representation they tend to resort to an intimist style, expressing «what is truly unique and personal»[32]; at times we even sense a confessional tone:

In keeping with the guidelines for this exercise and, being aware that candidates strive to present work of genuine didactical merit, replete with technicisms and praise, I prefer to opt for a simple but sincere confession of my professional life, with all of its dreams, successes and failures[33].

A considerable part of these reports involves extracurricular activities, experiments in social education, attempts to bring the school into greater proximity with the community and descriptions of the myriad activities that go beyond the instructional learning taking place within the classroom, because:

A teacher's labour should not be reduced to the better or worse teaching of the subjects of a school curriculum. We believe that the teacher's mission is more educational than instructional and that it should not consist only of interacting with children but also with adults, and not only within the narrow confines of the classroom but out in the street and anywhere else where he can play a dignified role[34].

These reports attest to the many varied activities that teachers engaged in with their outside of the school itself. These initiatives were meant to boost the presence and influence of the school, resorting to novel practices to modify its traditional role. «I made the school the centre and focal point of the town; everyone, old and young, benefitted from it. Exhibits, excursions, visits, conferences, complementary classes for adults, school fairs, etc.»[35]. Some of the activities were quite notable, such as the «educating the town by means of the press»[36], or the establishment of film projections open to the general public[37]. The reports, therefore, provide first-hand testimony about the more social, community-oriented educational practices taking place outside of the classroom. From this perspective they constitute an invaluable source for studying the mechanisms of social change that schools employed in the 1930s.

30 M. Zaforas Román, *Resumen de la labor profesional realizada*, C. 32/10748, AGA, 1933.
31 L. González Peiro, *Resumen de la labor profesional*, C. 32/10722, AGA, 1932.
32 A. Azcárate Echarren, *Memoria sobre la vida professional*, C. 32/10746, AGA, 1933.
33 F.A. Bulnes Sánchez, *Resumen de la labor profesional*, C. 32/10741, AGA, 1933.
34 G. Mateos Torres, *Resumen de la labor profesional*, C. 32/10747, AGA, 1933.
35 L. García Velasco, *Breve resumen de la labor profesional*, C. 32/10767, AGA, 1932.
36 G. Gómez de la Rúa, *Resumen de la labor profesional*, C. 32/10742, AGA, 1932.
37 J. Gadea Fernández, *Resumen de la labor profesional*, C. 32/10768, AGA, 1932.

2. *Competitive public exams for the position of headteacher during Francoism; ruptures and continuities in school practices*

The competitive exams for school headteacher from 1932, whose design resulted in the singular dossiers that we have categorised as institutional life archives, followed a model of selection that lasted through the Civil War (1936-1939) and, with some changes, throughout the duration of Franco's dictatorship (1939-1975). We can comfortably assert that, given the inertia regarding the selection process, there is a continuity of form between the files and dossiers of 1932 and those produced during Francoism[38]. In the pages that follow we will demonstrate that, although the typology described above refers to republican dossiers, it also serves as a useful tool for studying the files from 1932 through 1966, due the continuity in the formal requirements with which they were elaborated.

Under the dictatorship a total of twelve competitive exams were held to fill headteacher positions in graded schools – 1941[39], 1950[40], 1951[41], 1953a[42], 1953b[43], 1954[44], 1956[45], 1957[46], 1959[47], 1960[48], 1964[49], 1966[50]. The principle precept regulating these exams was the Teacher Statute from 1947[51]. This regulation established that 50% of the headteacher posts would be filled by means of a restricted competitive exam in those schools located in the capitals of University Districts[52]. Vacancies resulting from transfers were to be covered the same way.

In all of these convocations, as in the exam of 1932, candidates, in addition to carrying out a series of written, oral and practical exercises, were required to

[38] A study of the dossiers from competitive public exams under Franco can be found in Barceló, Comas, del Pozo, *La práctica escolar durante los primeros años del franquismo*, cit., pp. 334-357.

[39] «Boletín Oficial de Estado» (BOE), n. 135, 15 May 1941, pp. 3473-3474.

[40] «Boletín Oficial del Ministerio de Educación Nacional» (BOMEN), n. 32, 7 August 1950, pp. 648-650.

[41] «Boletín Oficial del Ministerio de Educación Nacional» BOMEN, n. 41, 8 October 1951, pp. 943-944.

[42] «Boletín Oficial del Ministerio de Educación Nacional» BOMEN, n. 4, 15 January 1953, pp. 62-63.

[43] «Boletín Oficial del Estado» (BOE), n. 18, 18 January 1954, pp. 317-322.

[44] «Boletín Oficial del Estado» (BOE), n. 354, 20 December 1954, pp. 8387-8388.

[45] «Boletín Oficial del Estado» (BOE), n. 4, 4 January 1957, pp. 69-72.

[46] «Boletín Oficial del Estado» (BOE), n. 276, 2 November 1957, pp. 6222-6226.

[47] «Boletín Oficial del Estado» (BOE), n. 74, 27 March 1959, pp. 4752-4755.

[48] «Boletín Oficial del Estado» (BOE), n. 53, 3 March 1961, pp. 3281-3285.

[49] «Boletín Oficial del Estado» (BOE), n. 13, 15 January 1965, pp. 785-792.

[50] «Boletín Oficial del Estado» (BOE), n. 265, 5 November 1966, pp. 13939-13942.

[51] «Boletín Oficial del Estado» (BOE), n. 17, 17 January 1948, pp. 226-243. The only two convocations that did not follow this norm were those held in 1941 and 1966.

[52] These were: Barcelona, Granada, La Laguna, Madrid, Murcia, Oviedo, Salamanca, Santiago de Compostela, Sevilla, Valencia, Valladolid y Zaragoza. («Boletín Oficial del Estado» BOE, n. 212, 31 July 1943, pp. 7406-7431).

have at least five years of official teaching experience[53]. Prior to the exercises, however, they were also asked to write an «original pedagogical report», that was evaluated by the chief-inspector of the province and that was made up of two parts. In the first of these, much like the exam from 1932, teachers had to summarise, with no guidelines whatsoever, their work in primary school. In this section the aspiring headteacher could include at will the qualifications and schoolwork that he or she deemed most pertinent. Teachers could therefore elaborate these reports with the documents and information that in their opinion best represented their professional life. Thanks to this margin of freedom, there continued to be a certain degree of autonomy in the way that these reports were written up under the dictatorship, as long as they were respectful of the ideological foundations of the Regime. The other section of this part of the dossier, which we find in the exams of 1926 but not in those of 1932, was labelled «school organisation». Here the candidates wrote a text explaining their conception of the graded school accompanied by a project for its organisation.

A considerable number of the documents generated in these competitive exams are conserved in the AGA. As in the case of the republican exams of 1932, among the documents housed here are exercises completed by candidates, scores obtained in the different tests and the minutes of the examining boards, which were composed of renowned pedagogical authorities. The candidates' dossiers are made up of a great variety of documentation as stipulated by the legislative requirements of each convocation. This includes the certified service record as well as documentary proof of the candidate's unblemished moral and professional conduct, a document emitted by the Primary School Inspection, mayors, priests, presidents of parents' associations or by individuals connected to the Regime's organisms. These endorsements proclaimed the candidates' virtues in relation to the Francoist cause, along with their faithful adherence to the principles of national-Catholicism.

However, the documents that are most relevant to our analysis are the reports of the professional life and school organisation elaborated in the preparatory phase of the exam, together with the supporting material. With regard to the reports, the aspiring headteachers presented a narrative that combined theoretical discourses – ones acceptable to the authorities that would be evaluating them – with the school practices that they considered most representative of their pedagogical activities. As with the 1932 *oposiciones*, there is a considerable heterogeneity in the contents. The teachers were striving to demonstrate their ideological fidelity (from courses in political training, war merits, references from people of acknowledged moral authority, etc.) while

[53] With the exception of 1966, when candidates were required to have held the position of headteacher of a graded school for ten years running.

also establishing their pedagogical aptitudes (with photographs[54], teaching materials, schoolwork, curricular programs, notebooks with lesson plans, articles published in professional journals, etc.).

An analysis of the dossiers produced under the dictatorship shows that these exams, despite being held in contexts that were diametrically opposed, continued to concede an appreciable margin of autonomy in the way that candidates could present their professional trajectory and work; in this sense, these dossiers also constitute an institutional life archive practice, like the republican dossiers. As a result of a lack of specific instructions or guidelines as to how candidates ought to elaborate this part of the exam, we find once more a plurality of strategies. The contents of these reports vary considerably, and there is no common order. Their length varies, the shorter ones conforming to the «curricular-bureaucratic» model described in the republican dossiers. Most of the candidates describe the outstanding aspects of their professional practice in the different schools where they have taught, following a similar structure to that of the «methodological-professional» and «biographical-narrative» models, before going on to present a project on how to organize a graded school. Some of these reports are accompanied by supporting documents, sometimes within the report itself – as a way of reinforcing the narrative –, in other cases as independent documents.

As with the convocation of 1932, the most common supporting documents are official reports and certificates. In some cases we find merits that have been awarded to the candidates for their role in the war; there are certificates for ex-combatants, for membership in the fraternity of «Ex-captives for God and Spain», for first aid work carried out in hospitals and with the injured, and for belonging to different delegations of the Frente de Juventudes [Youth Front] or the Sección Femenina. These are some of the credentials that candidates showed to prove their commitment and adhesion to the cause of the military insurgency headed by Franco. Some candidates went as far as to present death certificates of family members who lost their lives during the war[55]. Other documents, of course, were related to the teachers' professional activities. As in the case with the republican dossiers, the most commonly occurring documents are the reports written up by educational inspectors. In order to show that their teaching practice is endorsed by the authorities, teachers present literal transcriptions of inspectors' visit logs and certificates in which inspectors ratify the teacher's model professional and personal behaviour. But their professional trajectory was not sanctioned exclusively by inspectors; the testimony of mayors, priests and presidents of family associations also carried weight. We get a view here of how, under Franco, the endorsement of the teacher's trajectory by third persons

[54] Barceló, Moll, Sureda, *Imagen y práctica escolar en las memorias de oposición del franquismo: el caso de Baleares*, cit., pp. 28-41.

[55] C. Seguí Mercadal, *Certificación en extracto de acta de defunción*, L. 17.850, AGA, 1959.

– effectively silencing the candidate's own voice on occasions – continues to have a place in the dossiers, as occurred in the files from 1932. A variety of other certificates can be found as well, such as those accrediting teachers' attendance at conferences, their participation in exhibits or contests in different subjects, or their completion of specialised courses. The courses that appear to have been most popular among teachers were gymnastics, physical education, political doctrine, catechesis, homemaking activities, or the application in the classroom of certain instruments of experimental psychology, such as intelligence tests. But, as with the dossiers of 1932, there is ample testimony relating to the teachers' activities with their students: teaching material, notebooks, photographs, professional publications or documents relating to extra-curricular pursuits such as colonies, field trips, conferences, etc.

These supporting documents constitute a mixture of biographical, curricular and methodological testimony. However, it is in the reports of the professional teaching taking place in the classroom where we find the most valuable information for studying school practices of the time. Here the candidates provide us with a view of school organisation, curricular programs and lessons, the different methods used and tried in the schools and the out-of-school activities. Many of the elements are reminiscent of the «methodological-professional» and «biographical-narrative» models we described from the 1932 *oposiciones*. This makes them especially valuable for studying the discourses and practices that were widely used under the dictatorship. Then we will present examples of some of the teaching practices appearing in the dossiers dating from Franco's regime, which attest to a continuity with the practices described from the republican period.

An initial example has to do with the Decrolyan centres of interest; these were a common element of the school practices described by the 1932 candidates, and they appear as well in the reports of the Francoist exams, as in this instance, expressed by the teacher Bárbara Bernat Colom:

> I channelled all of the teachings in such a way that Religion and Patria were always the starting point and that their meaning would inform all of our schoolwork. In the diary war communiqué, we had more than enough material for our lessons and subconsciously this became the centre of interest around which our day's work revolved[56].

This example shows how the centres of interest, a practice growing out of the pedagogical reform movements and developed in public schools before the war, continued to be implemented under Franco. We can see how the nomenclature and the application of certain methods continued after the war, under the condition, of course, that the ideological principles of the regime not be questioned. The use of certain materials associated with these methods also carried on: «[…] games designed by Doctor Montessori, Froebel, Decroly and

[56] B. Bernat Colom, *Mi labor profesional*, C. 31/3126, AGA, 1941.

all of those that proved to be practical and useful»[57]. Candidates also resorted to innovative pedagogues to interpret some of these practices. Such is the case of the report presented by Andrés Rotger, where he explains the function behind the grouping of students in different levels. This teacher, in justifying the need for separating the students in levels, mentions John Dewey: «The class, therefore, should never be a 'mob', a simple horde of children; it should be a sort of miniature society (Dewey), the only way to harmonize School and Society, which is the people, the county, the city»[58]. Another element we find incorporated into the classroom practices of the candidates is intuitive and active teaching:

> I shall refrain from going into detail about how I like to employ all pedagogical procedures, that intuition is very helpful, and explaining how I apply an active procedure to its fullest in order to make the School fill the student's life to the utmost and even part of his family's life[59].

Proof of the use of this type of teaching can be found in some of the materials and schoolwork that candidates included in their dossiers as testimony of their professional activity, including handicrafts, calculus teaching materials and Montessori games[60]. Field trips and excursions also constituted a regular part of the students' school experience, in the name of «the physical strengthening of Spanish youth»[61]. This practice, as related in the reports, continued to be linked to a belief in an intuitive, naturalist approach to education: «They were like an intuitive complement to the lessons»[62]. In some schools students had a special notebook for keeping track of what happened during these outings[63]. This was known as an «excursion notebook», just like those frequently described in the dossiers from 1932[64].

The examples shown lead us to consider the fact that the image of the school has historically been based more on the influence of pedagogical and political discourses than on an accurate knowledge of the teaching practices used by teachers. As is shown by the dossiers from the competitive exams of these aspiring headteachers, we find more of a pattern of continuity than of rupture in the teachers' approach. This is clearly the case with certain teaching materials, routines and terminology, used within an ideological parameter considered

[57] *Ibid*.

[58] A. Rotger Pizá, *Actividades al frente de una Escuela Graduada y Memoria sobre la organización de un Colegio Nacional de Enseñanza Primaria que presenta el Opositor*, C. 32/01462, AGA, 1966.

[59] B. Sintes Palacios, *Labor profesional en la escuela*, C. 31/3127, AGA, 1941.

[60] J.A. Amengual Fondevila, *Cuaderno. Molinar de Levante. 1955*, L. 17.850, AGA, 1959.

[61] «Boletín Oficial del Estado» BOE, n. 503, 8 March 1938, p. 6156. Bernat Colom, *Mi labor profesional*, cit.

[62] Bernat Colom, *Mi labor profesional*, cit.

[63] Sintes Palacios, *Labor profesional en la escuela*, cit.

[64] G. Zarazaga García, *Resumen de la labor profesional*, C. 32/10722, AGA, 1933.

acceptable by the regime. And while the use of such practices may not have been widespread, we do find evidence of a degree of autonomy in the way that candidates could choose what pedagogical strategy to use to present contents that, due to the imposition of a specific political culture, were centred around Catholicism and Spanish patriotism. With this issue in particular, interpretations of school practices begin to diverge from the earlier period. The teacher Miguel Deyá, a candidate in the *oposiciones* of 1941, provides an example of this with the school magazines he included in his report, magazines that his students had produced following the printing technique conceived of years earlier by the French teacher Célestine Freinet[65]. Despite Deyá's furnishing complete issues of the magazines – all of them made during the war and immediately afterwards – and photographs of the students next to the printing presses, the French educator's name is not to be found anywhere in the report. It would seem that Deyá was aware that this school practice was linked to a pedagogue who was censured under the so-called «new Spanish pedagogy». He probably decided it was better not to name him.

In other instances, teachers chose to highlight teaching systems featured in professional journals or scientific entities associated with the «official» pedagogy: «In my school I have attempted not to follow a routine system but rather to adapt the methods to the modern orientation outlined by the Sociedad Española de Pedagogía (Spanish Society of Pedagogy) and the different publications that I receive regularly»[66]. This approach, we should note, is more common among teachers trained under the Francoist Escuelas Normales (Teacher Training Schools) than it was among those who had been teaching prior to the war. The fact of their having lived and worked in a school culture before 1936 would certainly have meant that many of these teachers, notwithstanding their compliance with the new contents and values imposed by the regime, would continue applying and transmitting methodological strategies from before.

Naturally, these reports also give us a glimpse of some idiosyncrasies of the Franco era. Some of the more novel of these date from the later years of the dictatorship and have to do with road/driving guidelines[67] and with typical rituals from the school at the time:

> In the building's enclosed patio, the children would line up in grades with their respective teachers. There we would lower the flag that during the day presided over our activities and the children would sing a patriotic song. When the song was finished, one of the older

[65] M. Deyá Palerm, *Memoria de la labor profesional realizada en la Escuela Nacional de Niños de Consell y en la Dirección de la Escuela Graduada de Son Españolet*, C. 31/3127, AGA, 1941.

[66] C. Seguí Mercadal, *Oposiciones a Direcciones de Grupos Escolares. Memoria*, L. 17.850, AGA, 1959.

[67] P. Ponseti Olives, *Memoria de las actividades y realizaciones efectuadas por el opositor Pedro Ponseti Olives al frente de la Escuela Nacional Graduada de Niños de Campos del Puerto (Baleares), de su Dirección y Concepto que tiene el opositor de la organización de un Colegio Nacional*, C. 32/01461, AGA, 1966.

children would go to the centre and call out a religious or patriotic slogan or rallying cry which was different every day and which all the children would repeat out loud[68].

The continuities and ruptures described show that the changes in school culture and practices did not necessarily move in tandem with or follow the pattern of the legislative and political changes. The universe of the school has its own rhythm and pace, one that, without sources such as those presented in this article, are hard to detect.

Conclusions

In this paper we have studied the documentation kept in the AGA from the competitive public exams for headteacher held at two very different historical times, the Second Spanish Republic and Francoism. An analysis of the convocations and of the exercises and dossiers from these *oposiciones* lead us to the conclusion that, concerning the model used for selecting headteachers, there is not a significant difference in the two periods. The dossiers share a very similar formal structure, which allows us to propose a typology based on the documents from 1932 which can then be applied to other exams from both periods and which proves useful for describing and classifying each candidate's personal documents.

The first question posed in this article focused on just what type of information these files could provide about Spanish school practices in different periods of the 20th century. One of the requirements made of the aspiring headteachers was that they present a report of their professional activity, accompanied by certificates and the supporting documents that they deemed pertinent. This collection of documents, which we call their «institutional life archive» has proved to be a rich source of information about day to day school life. The texts and accounts of the teachers, whose styles range from technical to intimist, lay out their professional experiences in depth and with a degree of detail that is difficult to come across in other sources. What's more, the way the exams were designed, with their requirement that the teachers justify their personal accounts, led to each dossier containing a wealth of complementary documents related to school practices (children's notebooks, photographs, certificates from educational authorities, newspaper clippings, pedagogical publications…). This sort of documentation, which is essentially the same before and after the war, constitutes an abundant and valuable source of information, with descriptions of both traditional and innovative teaching practices, while at the same time

[68] J.A. Amengual Fondevila, *Memoria*, L. 17.850, AGA, 1959.

conveying information about the teachers' stances with regard to concepts of the New Education movement and the pedagogical tradition.

The second question posed in this article was whether there were similarities and continuities in the school practices described in the reports from the Second Republic and Francoism. From a comparative analysis of the documentation produced in a similar way, based on the professional life stories of aspiring headteachers, we believe that there is a line of continuity between the school practices used before and after the Civil War. Teachers who had received their pedagogical formation before 1936 continued to use methodological strategies from the earlier New Education movement, such as the Decrolyan centres of interest and the Freinet printing press, although, aware of the Francoist disapproval of these pedagogues, they took care not to mention their names. Teachers also applied innovative methods in teaching religious and patriotic content, assuring as they did so a strict adherence to the regime's ideological orthodoxy. Our final conclusion is that no matter how aggressive or intransigent new educational policies may be, their effect on the mentality and classroom practices of teachers is minimal and at best superficial.

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Yearbooks as a source in researching school practices in private religious schools

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ABSTRACT: Yearbooks are a documentary source that lets us reconstruct certain school practices in religious schools that are, in general, rarely reflected in other types of primary sources. In this article, we asses yearbooks as a documentary source for learning about such practices by analysing the types of documents that fall into the category «yearbook», the religious orders or congregations in Spain that produced yearbooks and their geographic distribution within the country, how the yearbooks are structured, and the uses they have in educational historiography. We also note that, beyond their value of serving as a channel of communication between the schools and families, they also have value as builders of a historical account of school practices. To carry out our study, we examined a corpus

of 1,200 yearbooks belonging the Museum of Education at the University of the Basque Country.

EET/TEE KEYWORDS: Yearbooks; Religious schools; School practices; Spain; XIXth-XXth Centuries.

Introduction

Institutions and organizations, as a matter of course, produce public documents (reports, annuals, regulations, minutes, etc.) in which they record their activities. The same is true of schools; starting at the end of the 19th century, we find all kinds of reports that serve various functions: inspection reports, reports put out by secondary schools, reports prepared for the competitive national teaching examination, etc. In general, these documents have been regarded as grey and administrative literature, and little historiographic value has been placed on them. However, these are very rich documents, and within their pages we find a large amount of information about activities and internal dynamics in schools.

Within the range of texts produced by schools, yearbooks[1] are valuable in that they enable us to study schools from any number of perspectives: school buildings, internal regulations, extracurricular programmes, religious activities, athletic activities, student participation, school awards and punishments, school furnishings, laboratories, professional recommendations and guidance, socio-economic status, the symbolic representation present in religious schools. In short, they allow us to study the distribution of time and space in the practice of these schools. We therefore consider yearbooks to be a multi-faceted and versatile document that can provide information that is – in some cases fundamental and in others complementary – to the study of private education by religious orders and congregations. The explanation for why public schools in Spain have made little use of this type of document should be sought within the sociological aspects that explain the different *clientele* [customers] of the two classes of school. In this article, we analyse and describe the characteristics of these source texts, their structure and development, and the historical account upon which they are based. Furthermore, we discuss the use that is being made of these texts in educational historiography.

[1] In this article, we translate the Spanish term *memoria escolar* as «yearbook» rather than «school memory», as it better captures the type of document we are referring to.

1. *Yearbooks: an account of school practices*

Research carried out on school practice has, over time, examined a series of documents, objects, images, etc., with the aim of trying to reflect daily life in schools. School culture has been a constant referent in the field of study on school practices[2]. All these studies focus on what happens in the classroom, whether through national teaching examination reports, school exercise books, student teaching reports or inspection reports. In these texts we can discern, on the one hand, the agents that intervene in the classroom proper to conduct teaching and learning tasks, while on the other hand, we can observe the three cultures that are manifest in school practice: the empirical-practical culture, the culture linked to expert knowledge and the culture of managers of educational systems[3]. In short, these sources can be used to determine the daily life and tasks of schools by examining their rites, routines and experiences[4].

The first issue that arises when studying yearbooks is establishing the characteristics that differentiate them from the set of documents that aim to narrate school practice in a particular context. One document type comes from the recording of individual memory, that is, from autobiographies, personal memoires or diaries, texts that are usually called «egodocuments». However, many other documents, such as reports, memoranda, start-of-year presentations, etc., have also been produced in order to discuss school practice. Viñao[5] distinguishes at least five types of documents: institutional reports, school histories, newspapers or school exercise books by teachers and/or students, autobiographical texts, and autobiographical writing related to curricula vitae. Within this classification, yearbooks could be included in the first category as

[2] J. Ruiz (ed.), *La cultura escolar de Europa*, Madrid, Biblioteca Nueva, 2000. There is an extensive updated bibliography on school culture and school practices in two recently published monographic issues of «Educació i Història: Revista d'Història de l'Educació», vol. 35, January-June, 2020, under the title *The educational practice in dictatorial regimes during the 20th century*, which contains various articles on the use of a set of sources related to the actors of this educational reality, with the aim of understanding the dynamics of educational practices. To this end, the articles refer to three types of records: written, oral and visual; and vol. 14, n. 1 of the journal «History of Education and Children's Literature», 2019, under the title *Memories and public celebrations of education in contemporary times and organized on the basis of four sections: Place of memory, Politics of memory, Funeral memories and Invention of educational tradition.* This last section in particular contains interesting contributions for the scope of school practices.

[3] A. Escolano, *Las culturas escolares del siglo XX. Encuentros y desencuentros*, «Revista de Educación», special issue, 2000, pp. 201-218.

[4] F. Comas, B. Sureda, *La investigación histórica de la práctica escolar, reflexiones sobre sus fuentes*, in S. González, *et alii* (edd.), *La práctica Educativa. Historia, Memoria y Patrimonio*, Salamanca, Farenhouse, 2018, pp. 1045-1052. This volume contains contributions from V.L. Gaspar, S. González, M.M. del Pozo, C. Menguiano, G. Barceló, S. Moll, J. Meda and M.A. Martirena, in addition to the coordinators, to a workshop held in Palma de Mallorca on the occasion of the *VIII SEPHE Scientific Conference* and *the I Congresso Nazionale della SIPSE*.

[5] A. Viñao, *Las autobiografías, memorias y diarios como fuente histórico-educativa: tipología y usos*, «Sarmiento», n. 3, 1999, pp. 223-253.

a particular kind of institutional report, in that the creator of the document is usually not the school director or secretary and the content differs from what we might call the record of activities carried out at a school during a given time period. These institutional reports were usually presented either at the beginning or the end of the school year, and often as part of a ritualized act, with parents and authorities in attendance and where the main objective was not to make express reference to school practice but rather to the developments and changes that took place in the school during a given time period.

However, there are two aspects of the written sources that are of great interest to us. The first is that, in general, these are primary sources that are handwritten or typewritten reports, as in the case of the national teaching examination reports, the student exercise books and the inspection reports, and the second is that they refer, in most cases, to public schools. Given this situation, the defence of yearbooks that we wish to mount in this article highlights two important features: one, that yearbooks are printed texts published in a periodic manner, have a promotional purpose, and are produced by the administration of a private religious school; and two, they offer a historical account of a school's activities during the school year. In other words, the yearbooks are meant to serve as advertisements, and they also provide a historical record of the various school practices. As such, yearbooks do not have the subjectivity that exists in the texts like those written by students or in the narratives found in the national teaching examination reports[6]. The texts written by students are often published in student magazines, and through these immediate impressions of the learning process we can verify school practice. As such, student exercise books should be read as going beyond a mere pedagogical observation of the learning process[7]. As for the national teaching examination reports, although they make reference to an exceptional situation in the teaching career, they summarize the full nature of accessing the profession through an exam[8]. In addition, a very interesting feature of this type of report is that, in many cases, it is accompanied by an «exhibition of professional work», which includes

[6] G. Barceló, F. Comas, M.M. del Pozo, *La práctica escolar durante los primeros años del franquismo*, «História da Educaçao», vol. 22, n. 54, 2018, pp. 334-357; G. Barceló, S. Moll, B. Sureda, *Imagen y práctica escolar en las memorias de oposición del franquismo. El caso de Baleares*, in S. González *et alii* (edd.), *La práctica Educativa*, cit., pp. 671-681; and M.M. del Pozo, *Justa Freire o la pasión de educar: Biografía de una maestra atrapada en la historia de España (1896-1965)*, Barcelona, Octaedro, 2013.

[7] B. Martín, I. Ramos, *Una nueva manera de interpretar los cuadernos escolares: las escrituras al margen*, «History of Education & Children's Literature», vol. IX, n. 2, 2014, pp. 643-660; B. Martín, I. Ramos, *La historia contada en los cuadernos escolares*, Madrid, Catarata, 20015; M.M. del Pozo, S. Ramos, *Prácticas de escritura en los cuadernos escolares españoles (1920-1940)*, in J. Meda, D. Montino, R. Sani (edd.), *School Exercise Books. A Complex source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, Florence, Polistampa, 2010, pp. 823-845.

[8] P. Dávila, *Las oposiciones al magisterio y la normalización de los saberes pedagógicos*, «Revista de Educación», n. 286, 1988, pp. 115-127.

the candidate's teaching trajectory. These are very rich documents in that teachers usually write about their motivations, the practices they carry out, their professional concerns, and they even include exercises completed by their own students. In sum, this report type is an autobiographical document that contains the candidate's professional journey and includes the formation of their professional identity as teachers, as well as a wealth of information on teaching practice. Thus, even for the national teaching examinations held during the first part of the Franco regime, some teachers speak of their experience during the Second Republic and their professional and ideological assimilation to the new regime, in some cases after having survived the purging processes. These biographical narratives are very rich from the point of view of school practice, and because of their personal nature they are very difficult to obtain without access to personal files/documents. The practicum reports have also been the object of interesting historical-educational work in a learning context[9].

In contrast to the above types of written documents, yearbooks have the virtue of distancing themselves from the immediacy of educational accounts in order to try to produce a historical account that is in line with a classic narrative scheme: setting, rising action, and denouement. The setting would be the context in which the school is embedded, its attributes, its infrastructure, etc.; in other words, the time and space of the school's practice. The rising action would include the actors and the opportunities offered by the school, its educational offering, etc.; that is, the interplay of forces involved in the practice. Finally, the denouement would be the choice that families make, within the framework of marketing a «product» that obeys the rules of marketing[10]. In this sense, when families choose a school for their children's education, they are giving added value to their consumption of educational services, if we can speak in terms of the freedom of school choice and the right to education.

In the story offered by the yearbooks, we must emphasize that the everyday life they present is not the everyday life of the classroom, nor do they present the spontaneous photographing of a school activity, or the randomly occurring extra-curricular activities, or the voices of the teachers who explain their teaching

[9] G. Barceló, F. Comas, B. Sureda, *Abriendo la caja negra: la escuela pública española de posguerra*, «Revista de Educación», vol. 371, 2016, pp. 61-82; G. Barceló, S. Moll, B. Sureda, *La escuela privada religiosa en Mallorca durante la postguerra. Cultura y práctica escolar*, «History of Education & Children's Literature», vol. 12, n. 2, 2017, pp. 191-212; G. Barceló, T. Rabazas, *La escuela en Mallorca durante el franquismo, una aproximación a través de las memorias de práctica del Fondo Romero Marín*, in F. Comas, S. González, X. Motilla, B. Sureda (edd.), *Imatges de l'escola, imatge de l'educació: Actes de les XXI Jornades d'Història de l'Educació*, Palma, University of the Balearic Islands, 2014, pp. 87-100; M.M. del Pozo, T. Rabazas, *Imatges fotogràfiques i cultura escolar en el franquisme: una exploració de l'arxiu etnogràfic*, «Educació i història: Revista d'història de l'educació», n. 15, 2010, pp. 165-194.

[10] P. Davila, L.M. Naya, I. Zabaleta, *Internados religiosos: marketing del espacio a través de las memorias escolares*, in P. Dávila and L.M. Naya (edd.), *Espacios y patrimonio histórico-educativo*, 2016, Donostia, Erein, pp. 183-207.

experience or the voice of the student who narrates their school learning. On the contrary, yearbooks transmit a school routine that seems objective, one that is marked by the distance that comes with the passing of a school year, from the structure of a historical account. They are not texts created to chronicle events, rather they use the tools for constructing ideological discourse: that is to say, they select and blend the school activities that leave a mark on students' memories, narrate a particular school order and give a historical account of a shared experience from the point of view of the school's religious leaders. Thus, they can be viewed as an account of the school's attributes and educational offer, always filtered through the laws of marketing. In other words, it a historical account governed by marketing strategies. The fact that the chosen time frame is an academic year provides the narrative thread for a school's events and sufficient distance to give the yearbook greater objective value relative to the directness of memory. Therefore, unlike other types of institutional reports, yearbooks have a specific value in that their main purpose is to produce a document of historical value, one is perfectly structured to create a link that helps the reader identify with the school.

Given the above, there are two aspects of the yearbooks that should be highlighted and that differentiate them from other types of documents. Firstly, they are invariably printed texts that contain a profusion of high quality photographs, have an attractive design and follow an established structure. Secondly, these documents were made by private schools with the aim of delineating their educational offering based on a historical account. These two aspects may be the reason why they have not generally been considered a high-value primary source, given that more readily accessible public documentation seems to have more prestige than this kind of material, like the yearbooks, which can be confused with ephemeral literature and have no historiographic value. Hence, in many cases, it seems there has been a certain devaluation of the yearbooks, where they are not viewed as a useful document for analysing certain school practices in private schools[11].

Moreover, in turning to how the yearbooks are presented as a document, they are much richer from a narrative point of view, since they are not just dry text, guided more or less by the will of a school director or secretary; instead they have the liveliness and dynamism of a text-based story that is combined with images, making the story more readable and therefore more accepted by the reading public, which in this case is the students' families. This combination of text and image enables a discourse where the interconnection between image and text is fundamental for the production of meaning. This phenomenon,

11 P. Davila, L.M. Naya, I. Zabaleta, *Memory and Yearbooks: An Analysis of Their Structure and Evolution in Religious Schools in 20th Century Spain*, in C. Yanes, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017, pp. 65-79; and Davila, Naya and Zabaleta, *Internados religiosos*, cit.

following del Pozo[12], could be called an iconotext. Likewise, the fact that in the production of some yearbooks a handful of students are nominally involved or that a few teachers or directors write articles adds a layer of attraction for the reader, since he or she is very familiar with the actors – their children and the teachers – and the context in which they act. Nevertheless, surely the greatest attraction for readers is seeing the photographs of students, taken as either individuals, as in the case of having won a prize, or as part of a class group. As we have noted elsewhere, it is not at all presumptuous to view these yearbooks as the Facebook of their time and recognize that the current web-based version is nothing more than a highly technical continuation of its paper-bound predecessors, its main use being a resource to locate former students or classmates[13]. We cannot forget that, in the evolution of yearbooks, the section that has student photographs is, without a doubt, the one that has had the greatest continuity. That is to say, although the yearbook was born with the aim of capturing the names of the illustrious students of the prestigious English private schools[14], this is precisely what remains today, either in individual or group photographs, whether in paper or digital edition. In this way, the use of the students' photographs acts as a certificate of attendance at a given school. This fact is reflected in the yearbook for the 1961-62 academic year from the Piarist school Escolapios de San Antón:

> Believe it or not, all those boys posing for the cameras are serious people. They are aware that the excursion to the Casa de Campo is not to have fun kicking a ball but instead a very important means of oxygenating and decongesting lungs that have been atrophied by the smoke of the big city[15].

In short, bearing in mind the analysis of both internal and external criticism, yearbooks should be considered in all their potentialities as a document that transmits a continuous historical account within the limits entailed in the bias of authorship but with an explicit function of constructing students' memories.

2. *Yearbook types and names*

Within the set of yearbooks that form the present corpus in the Museum of Education at the University of the Basque Country, we can distinguish three

12 M.M. del Pozo, *Imágenes e historia de la educación: construcción, reconstrucción y representación de las prácticas escolares en el aula*, «Historia de la Educacion», n. 25, 2006, pp. 291-315.

13 Davila, Naya, Zabaleta, *Memory and Yearbooks*, cit.

14 *Ibid*.

15 Escolapios de San Antón, *Memoria escolar del curso 1961-62*, Madrid, Escolapios de San Antón, p. 49.

types: one is made up of the texts that are called «award ceremony booklets» or similar, the second is comprised of «student directories», and the third type contains the yearbooks proper. If we study the contents of these different categories, we can see that the first includes the solemn act of presenting awards and diplomas to students for the quality of their work, texts that enjoyed great prestige throughout the 19th and 20th centuries and were produced by the secretaries of each school. In most cases they were printed and bound together the texts that were to be read during the award ceremonies at the end of the academic year, which were highly ritualized. The second type contains the mere enumeration of personal information about a school's student body; these were frequently used in schools run by the Jesuits. The third type, that is, the yearbook, is more comprehensive; in addition to listing the distribution of awards, they replace the student directory with group or individual photographs and in addition they chronicle the activities that took place throughout the school year.

For the documents in this last type, «Memoria escolar» [School Report/ Memory] was the predominant title used, although we can see others such as «Ecos del colegio» [Echoes of the School], «Alborada» [Dawn] or «Vida Escolar» [School Life] in the Marianist schools, «Alas» [Wings] in the Dominican-run schools, «Anales» [Annals] in the Lasallian schools, «Adelante» [Forward] in the Dominican Sisters of the Annunciation schools, «Nuestro colegio» [Our School] in the Franciscan schools, etc. In spite of this nominal difference, because the structure and contents vary little, we can consider them as belonging to the same category.

We are inclined to argue that the most immediate antecedent of the yearbooks is in the formal award ceremonies that were held at the end of the academic year. In this sense, the first yearbooks from prestigious schools, as far as we are aware, come from the schools and boarding schools run by the Brothers of the Christian Schools (La Salle), specifically from Colegio Condal (1903-1904 academic year) and from Nuestra Señora de la Bonanova (1905-1906 academic year), both in Barcelona. Given that the publication of the first yearbooks coincided with this congregation's expulsion from France in 1904, a plausible initial hypothesis was that De La Salle brought them to Spain from France. However, we have been able to verify that this hypothesis is not supported, as this type of document was not published in France at that time. However, there are others called «Distribution Solennelle des Prix» (formal award ceremony) or «Palmarès» (list of award winners), as we have attested in the Lasallian Archives in Lyon, where we find a significant amount of documentation from schools run by the Brothers of the Christian Schools in France. It is surprising that none of the large prestigious boarding schools in France or Belgium published this type of document at that time and that they only began to publish them a little later, during the First World War. Moreover, we have not found any express mention of yearbooks in the «Bulletin des Écoles Chrétiennes», which began

to be published in 1907, nor in the circulars written by the various Brother Superiors from the establishment of the congregation to the present. Reference is made to the yearbooks in the bulletin on only one occasion in 1932, in which the pros and cons of publishing yearbooks are set out but no specific directives are given, even though the bulletin editor's favourable position is clear when he states «publication will present many advantages and few disadvantages […] let us consider it a valuable instrument of apostleship and a means of linking, whose service will compensate us greatly for our efforts»[16].

In Spain, the case of the Nuestra Señora de la Bonanova school in Barcelona is paradigmatic illustration of the shift from «Award Ceremony» to «Yearbook». Thus, from 1906, the date the document was first published, through the 1912-1913 academic year, the title was «Award Ceremony», following the French model, partly as a continuation of the documents produced in France[17]. The word «Memoria» [Memory] first appears in the 1913-1914 academic year, the year that corresponds to the school's 25th «silver jubilee» anniversary. A historical review was published for the occasion, and the word «Memoria» was added to the original «Award Ceremony». The dual designation remained until the 1926-27 academic year. Finally, in the 1927-28 academic year, the title was changed to «Yearbook 1927-1928», where the corresponding dates were added. This change did not affect their covers, however; the four identifying elements of the previous document are preserved: the building, the Virgin of Bonanova, a panoramic view of the city of Barcelona from the foothills of the Tibidabo mountain and the star representing La Salle[18].

3. *Religious orders and geographical distribution of the yearbooks*

Our yearbook analysis is based on a significant corpus of 1,200 yearbooks registered and deposited in the Museum of Education at the University of the Basque Country. This collection of yearbooks has been built up over the last few years through donations and acquisitions made by the Museum itself. As a result, the texts in our collection are not necessarily representative of these texts more generally, as the only criterion for adding them to the collection has been either by acquiring what is available on the antique book market or by accepting donations of complete series from some schools. With regard to donations, the Brothers of the Christian Schools (Santiago Apóstol in Bilbao,

16 Institute des Écoles Chrétiennes, *Pour un bulletin d'École et de l'Amicale*, «Bulletin des Écoles Chrétiennes», n. 3, 1932, pp. 152-157, in partic. p. 157.

17 Institute des Écoles Chrétiennes, *La distribution des prix dans les écoles des frères*, «Bulletin des Écoles Chrétiennes», n. 3, 1910, pp. 255-267.

18 Davila, Naya, Zabaleta, *Internados religiosos*, cit.

Condal and Bonanova in Barcelona) and the Marianists (El Pilar in Madrid, Colegio Católico Santa Maria in Vitoria and San Sebastián) have been of great help, having either donated yearbooks or giving us permission to access and reproduce what is extant in their archives. These donations present a bias in terms of the volume of yearbooks, although it does not represent more than about 30% of the total of yearbooks that we have. Another bias that needs to be noted is that of the total volume of yearbooks available, 977 correspond to all-boys schools, 33 to all-girls schools and 190 to co-educational school, and most of these date from 1970 onwards. The reason for the lack of yearbooks from all-girls schools is mainly due to the fact that the all-boys religious schools enjoyed great prestige, while in general the all-girls ones did not. There are some exceptions, however, such as the Ursulines or the Society of Mary, who ran highly prestigious schools that educated the elite; however, we are not aware that they published a yearbook. The following table shows the number of yearbooks in terms of the religious orders or congregations that ran the schools in our corpus.

Table 1. Yearbook corpus at the Museum of Education at the University of the Basque Country by religious order or congregation

Religious order or congregation	N	%
Brothers of the Christian Schools – La Salle	625	52.08
Piarist Fathers	103	8.58
Society of Mary – Marianists	98	8.17
Institute of the Marist Brothers	52	4.33
Society of Jesus – Jesuits	35	2.92
Claretian Missionaries	32	2.67
Salesians of Don Bosco	27	2.25
The Brothers of Christian Instruction – La Mennais Brothers	19	1.58
Dominicans	18	1.5
Augustinians	14	1.17
Other orders	150	12.5
Others (public)	27	2.25
Total	**1200**	**100**

The schools with the highest number of yearbooks in our collection are: Colegio Santiago Apóstol in Bilbao (80); Colegio Nuestra Señora de la Bonanova in Barcelona (59); Colegio de San José – Escuelas Pías in Santander (53); Colegio Condal in Barcelona (50); Colegio Católico Santa María in Vitoria (38); Nuestra Señora de Lourdes in Valladolid (36); Colegio de la Concepción in Barcelona (32); Aux Lazaristes in Lyon (31); Colegio Católico de Santa

María in San Sebastián (31); La Salle in Santander (26) and Real Colegio de las Escuelas Pías de San Antón in Madrid (24); most of these schools belong to the La Salle, Marianist or Piarist orders. In the case of the Jesuits, publishing yearbooks was not common practice, since they preferred to publish student directories containing students' personal information. We note that, with the exception of the Piarists, all the congregations are of French origin, thus they share the same school culture and very similar school practices[19]. Despite this, it cannot be said that there is uniformity in the criteria used to prepare the yearbooks. As for the geographical distribution of the yearbooks among the Autonomous Communities into which the Spanish State is currently organized, the distribution is as follows:

Table 2. School yearbooks in the collection at the Museum of Education at the University of the Basque Country by Autonomous Community

Autonomous Community	N	%
Castile-La Mancha	12	1.00
Canary Islands	13	1.08
Balearic Islands	18	1.50
Aragon	21	1.75
Melilla	21	1.75
Asturias	24	2.00
Andalusia	37	3.08
Castile and León	79	6.59
Cantabria	82	6.84
Valencia	88	7.34
Madrid	89	7.42
Catalonia	239	19.93
Basque Country	290	24.19
Other Autonomous Communities	14	1.09
Foreign	172	14.34
Total	**1200**	**100**

As can be observed, Catalonia and the Basque Country account for 44% of the yearbooks in our collection. In these two regions there is also a high presence of Lasallian schools, due to their proximity to the border and their degree of economic development, two of the factors that made the arrival of

[19] P. Dávila, *Las órdenes y congregaciones religiosas francesas y su impacto sobre la educación en España. Siglos XIX y XX*, in J.Mª Hernández (ed.), *Francia en la educación de la España contemporánea (1808-2008)*, Salamanca, Ediciones de la Universidad de Salamanca, 2011, pp. 101-160.

the Brothers of the Christian Schools in Spain possible[20]. Additionally, 14.34% of the yearbooks were published outside Spain (Europe: France (95), Belgium (20), Italy (6), Great Britain (5); the Americas: Nicaragua (12), Colombia (7), Cuba (13)).

Another aspect that must be taken into account when analysing the yearbook corpus is the time span of the available documentation. The oldest text we have is a «Distribution Solennelle des Prix» from the Lasallian Aux Lazaristes school in Lyon for the 1839-1840 academic year, and the most recent is a yearbook for the 2017-18 academic year from the Marianist Colegio Católico Santa María in San Sebastian. Throughout this period, we observe an uneven publication of yearbooks, where there is an increase in publication between 1944 and 1970, followed by a decline. This evolution can be explained in the following way: until 1900, practically all the yearbooks are award ceremony booklets, and until the 1920s we have yearbooks from very few schools, although these are very prestigious ones. From this point forward, excluding the period corresponding to the Second Republic (1931-1939), the number of yearbooks increased considerably, and we consider this period to be the «golden age» for the presence of religious orders and congregations in education in Spain and, consequently, for the publication of this type of document.

Nearly 55% of the yearbooks were published between 1944 and 1970, a period that is bookended by two important laws that regulate the educational system – the Primary Education Act of 1945 and the General Education Act of 1970 – which makes the yearbooks a good gauge for analysing the evolution of the school practices during Francoism. The 1945 law, in addition to the subsidiary role that the State played with respect to education by religious orders, affected school practices through a new curriculum. This circumstance explains the school environment that is reflected in the yearbooks of that time, providing us with very valuable information. Looking more closely at the religious orders in our corpus, 285 the 625 yearbooks published by Lasallian schools date from the 1945-1970 period, while the analogue is 63 of 103 for the Piarist Brothers schools, 46 of 98 for the Marianist schools and 34 of 52 for the Marist schools. Again, we see that the congregations of French origin are the ones that lead the ranking.

[20] P. Dávila, L.M. Naya, H. Murua, *The educational work of the De la Salle Brothers and popular education in Gipuzkoa in the twentieth century*, «History of Education: Journal of the History of Education Society», vol. 41, n. 2, pp. 213-233.

3.1 *Stages in the evolution of yearbooks in Spain*

An analysis of the yearbooks published in Spain with respect to their covers, internal structure, graphic and textual design, advertising presence, and so on, lets us establish a timeline comprising four stages.

The first stage, which we call the «defining and marketing» stage, goes from the date of the earliest yearbook in our corpus until the end of the 1920s. In this stage, the yearbooks are not called such; as we noted above they were called «Formal Award Ceremonies» or «List of Award Winners». In other words, these are the documents read at the end of each academic year and in which students are given awards for various reasons – academics, comportment, calligraphy, etc. – and they are of immense importance. It seems that it was more important to highlight the prestige of the school on the basis of student achievement rather than developing an authentic account of what happened at the school during the year.

The second or «consolidation and expansion» stage goes from the 1920s to the 1970s, where we observe the presence of many of the features that would become fixed structures or sections containing content that schools use to market their facilities (laboratories, sports fields, classrooms, dormitories, libraries, chapels, dining halls, etc.). In addition, the information provided about school practice falls into three areas: religious activities, cultural and sports activities (under different names), and awards and photographs, where group photographs of the whole class were increasingly replacing photographs of individual students. In the schools run by the Marianists, the term «intimate or family life» was used to refer to the internal life of the school. For the Lasallian schools, they refer to the school chronicles, where the objective is to capture the most relevant events occurring at the school each month. In this case, the Lasallian schools are very systematic in presenting this information, while schools run by other religious orders present this information in a more perfunctory way. In this sense, we can indeed observe a genuine discourse, where the more or less precise chronological account traces the key elements of the narrative: Christian education, physical education, the prestige of the school, the distinction of social class, Christian commitment, Catholic associations, hymns, excursions, athletics, etc. In other words, a set of references that go into creating an identity based on membership and a religious «brand». This stage corresponds to the «golden age» of the yearbooks, especially since private religious schools received significant State aid under Francoism, which allowed them to expand.

The third or «photograph-dominant» stage starts in the 1970s and continues into the 1990s, and in it we observe a regeneration of the yearbooks. Many of them disappear and then are published again years later in a completely renewed format, consisting of little more than photographs of groups of students and of some school activities that usually take place outside the classroom. This

transformation can be explained by the implementation of the 1970 General Education Act, which led to changes in school funding and dictated a new role for private schools, engendering a certain amount of reservation, which created a degree of fear in the religious schools and made evident the monopoly they had had until then[21]. Furthermore, the influence of Vatican Council II in terms of discretion, attention to the poor and a return to the origins of religious institutes pushed the missions of this type of school in a different direction[22]. Likewise, the expansion of schooling to a larger pool of students and the hiring of lay teachers and other internal innovations within the schools themselves all led to a diminished commitment to presenting the activities that took place at the schools. These changes will signal the beginning of a new path, where the yearbooks are going to be of little interest from the historiographic point of view. Most of them do not include in depth information about the activities carried out at the school, and instead, the account is limited to group photographs, listing the names of students, and a few texts on the school's mission or pedagogical values.

Finally, the fourth or «transition to digital» stage covers the period from the 1990s to the present. In this stage, the yearbooks still publish the group photographs and, in some cases, the school rules, a list of teachers and the school's ideology. However, this does not allow us to establish guidelines for determining from a historiographic point of view which activities they carry out, the actual curriculum they teach, the role of the Alumni Associations, etc. Moreover, the Internet and schools' web pages can be considered, in some cases, to be a new version of the yearbooks, something which both public and private schools already do. An analysis of these web pages can be a good source of information for comparing the historiographic value of the yearbooks.

4. *Yearbook authorship, purpose and structure*

In line with the features we have uncovered regarding the yearbook types, we note that these yearbooks are, in most cases, characterized a lack of evidence as to who their editors are, so it appears they are a joint effort. For this reason, we cannot affirm that authorship corresponds to the school's director or secretary or another member of the religious community, given that we are dealing with

[21] M. Puelles, *Educación e ideología en la España contemporánea*, Madrid, Tecnos, 2010; A. Viñao, *Escuela para todos. Educación y modernidad en la España del siglo XX*, Madrid, Marcial Pons, 2004.

[22] P. Dávila, L.M. Naya, *Turning Need into a Virtue: The Adjustment to the Educational Demands of the Religious Congregations: The Case of De La Salle in the Basque Country, Spain*, in R. Bruno, J. Igelmo (edd.), *Catholic Education in the Wake of Vatican II*, Toronto, University of Toronto Press, 2017, pp. 92-110.

anonymous accountings and that the chronicling of the school's academic year is told by the collective anonymity. In spite of this, we know that, in general, the writing of the yearbook was done by only one person, a member of the order or congregation, although for this task that person had information provided by the students, the teachers, the director and the families. In some cases, there are also contributions made by alumni. It is striking that in the majority of yearbooks belonging to the Marianists, we can see that students actively participated from the beginning by writing articles on different subjects. These are short essays in which the students give their impressions about trips and share knowledge about certain curiosities and even personal feelings about school activities. This type of collaboration is very clear, particularly in the 1950s and 1960s. Although they are an atypical case, they do offer us a different perspective on Marianist pedagogy in relation to students' participation in school activities, since they are often in charge of writing part of the text, as can be seen in the example of *Soy Pilarista* [I am a Pillarist][23].

The yearbooks, in addition, have three clear purposes: the first is to construct students' future memory; the second is to promote a marketing strategy regarding the school and build a brand; and the third is to serve as a communication link between families.

To achieve the first purpose, yearbooks impose the voice of an imaginary and anonymous author that guides the narrative, with the aim of imbuing them with greater value in the eyes of the individual rather than as a historical document. There is clear interest in recording the lived events in students' memory, as a kind of indelible mark that will accompany them throughout their life. The school yearbook editors are aware of its importance, not only in terms of marketing or as a chronology of events, but also for the power that the written word has in making life-long memories. To that end, most of the yearbooks use a literary device that facilitates closeness and communication: speaking to readers, be they the students themselves or their families, through a fictitious guide.

Some examples help will us to understand this function of constructing students' individual memory, their group identity, their memories about the school, etc., with the aim of fixing the present lived experience as a future memory that will accompany them throughout their lives. This is what we see in the yearbook from the Colegio Nuestra Señora del Carmen in Melilla in 1942:

> My name is YEARBOOK [in capital letters in the original, and literally «school memory»]. It's my name because I try to help you relive the happy times of your childhood and adolescence by recording your first struggles and triumphs[24].

[23] *Siempre pilarista*, Madrid, Asociación de Antiguos Alumnos Nuestra Señora del Pilar, 1995.

[24] Nuestra Señora del Carmen de Melilla, *Memoria Escolar de 1942*, Melilla, Nuestra Señora del Carmen, p. 9.

Another example is offered by the yearbook for the 1947-48 academic year at Colegio Santiago Apóstol de Bilbao, which begins with this text:

> Today it's in your hands. The SCHOOL YEARBOOK [capitalization in the original] must be rich in notes of varied tones which, when set in the stave of recall, will imbue your emotions with the evocative harmony of a fragment of your life. With the fact of its emotional sense[25].

In this construction of future memory, an issue arises regarding the value of the yearbooks as potential builders of students' memory and whether it is the case that the yearbooks, as a document produced in a past historical present, contribute to the personal memory of the students in the future. This is an important issue and it requires an in-depth study of these aspects, taking advantage of the view of yearbooks as mirrors of former students. In other words, we need to compare the account of the past with the present-day memories of students. It is also important to highlight that, to a certain extent, yearbooks construct a collective memory of student cohorts, and as such that they offer a certain sense of belonging, which we can also relate to how individuals come to identify with the school or cohort[26]. Likewise, the yearbooks contribute to our understanding of the subjective value of students' memory[27] in terms of their recall of their experience and how they build students' future memory by projecting, at the time of publication, a representation of the school that helps students identify with it based on a notion of group membership, on eliciting a feeling of identity and on the construction of a collective memory. In this sense, we can affirm that the yearbooks constitute a building block in successive generations' memories of school[28]. It does not escape our attention that this approach to research is based on studies on memory, History and forgetting[29].

The second purpose of the yearbooks is to develop a marketing and brand-building strategy[30], which the school directors promoted by displaying their academic offerings. From this perspective, yearbooks are presented to us as an advertising brochure in which it is clear that the most important thing is to highlight the attributes and status of these schools. This statement applies, above all, when speaking of the yearbooks from boarding schools. For this reason, a wealth of photographs is the best way to transmit the quality and quantity of the facilities and activities – both educational and recreational – on offer, making them a powerful advertising tool. In the yearbook pages we

[25] Colegio Santiago Apóstol, *Memoria Escolar de 1947-48*, Bilbao, Santiago Apóstol, 1948, p. 14.

[26] E. González, *Memoria e Historia. Vademécum de conceptos y debates fundamentales*, Madrid, La Catarata, 2013.

[27] Davila, Naya, Zabaleta, *Memory and Yearbooks*, cit.

[28] P. Dávila, L.M. Naya, J. Miguelena, *On May '68 in Spain: student youth and the autonomous universities*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 135-155.

[29] P. Ricoeur, *La memoria, la Historia, el olvido*, Buenos Aires, FCE, 2003.

[30] N. Klein, *No logo: El poder de las marcas*, Barcelona, Planeta, 2011.

can find not only the prospectus of the boarding school but also photographs of the infrastructure available (dining rooms, rooms, classrooms, laboratories, etc.)[31]. The yearbooks, as an object of use, also comply with Bourdieu's concept of social distinction[32], since beyond the identity of the school itself, they are presented as a consumer product, where social agents play an important role insofar as the consumption of a certain cultural service, by which we mean the type of education given by one or another religious congregation, carries a mark of distinction that goes beyond the socioeconomic status of the consumer.

Turning to the third purpose, yearbooks are also a means of communicating with students and their families. They are publications that the schools produce each year with the aim of increasing the cohesion between the school and families, thereby strengthening the feeling of belonging to the educational community and transmitting information about its activities[33]. This fact can be clearly seen on the yearbooks' dedication page: «To the parents of our students, who honour us with their trust and thus contribute to the current growth and prosperity of the school, we dedicate this school yearbook»[34]. At the same time, in the yearbooks the students recognize themselves as belonging to a space, to a school practice that they share with their peers.

As for the content and formal structure of the yearbooks, we observe the following elements: cover, presentation of the school's educational mission, portraits of school authorities on the opening pages, the school's prospectus, information about religious activities (Marian congregations or similar), a detailed, month-by-month chronicle of the year, athletic, artistic and theatrical activities, a photo gallery showcasing students who have won awards and a student directory. A characteristic element of most of the yearbooks is the hierarchical presence of the schools' symbolic universe. In this sense, religious figures appear alongside civil figures: the Virgin Mary, the Pope, the Superior of the congregation, the head of state and the head of the school. The most common of these images is the Virgin Mary, each school using their own Marian title (Nuestra Señora del Carmen, in the case of the school of the same name in Melilla; Nuestra Señora de Begoña in the case of the Santiago Apóstol de Bilbao, the Virgin of Lourdes in Valladolid etc.). The Pope also is a constant presence from the 1930s onwards, while the figure of Franco practically disappears from the yearbooks from the 1950s onwards[35].

31 Davila, Naya, Zabaleta, *Internados religiosos*, cit.

32 P. Bourdieu, *La distinción. Criterios y bases sociales del gusto*, Madrid, Taurus, 1979.

33 P. Davila, L.M. Naya, *Las memorias escolares, una forma de prensa escolar*, in J.Mª Hernández (ed.), *Prensa pedagógica, mujeres, niños, sectores populares y otros fines educativos*, Salamanca, Universidad de Salamanca, 2018, pp. 593-602.

34 Colegio Condal, *Memoria escolar del curso 1951-52*, Barcelona, Colegio Condal, 1952, p. 8.

35 Davila, Naya, Zabaleta, *Memory and Yearbooks*, cit., pp. 72-73.

5. *Uses for yearbooks in the educational historiography of religious schools*

To round out what we have said about the validity of the yearbooks as a documentary source for the use in History of Education, it is relevant to look for examples where we can verify their use and validity in view of the defence we have mounted the yearbooks as a historical account of school practices. We are going to focus on two ways of analysing this use: one is to look at the use made in educational historiography of the yearbooks from certain private religious schools, and the other is to examine web pages where we can observe historical narratives that make use of yearbooks.

As far as educational historiography is concerned, we can see that the yearbooks have been used as a vehicle for «constructing» the history of the Marianist school El Pilar in Madrid, where photographs of students are displayed as an iconographic resource to show the evolution of the school. Although there are exceptions, in general we can say that yearbooks have been scarcely used in historiographic works[36].

With regard to former students' use of their yearbooks on web pages, by way of example we can see how some alumni or alumni associations have used the yearbooks to link their personal experience with the experience lived in the schools[37]. Another case is the Calasanz school in Santander, which made the full text of the yearbooks from the 1940-41 academic year to the present publicly available. The reason they give is that the yearbooks are «graphic documents that bring together the most relevant events in school life and the students who have lived it»[38]. These digitized documents are available in low quality on the web and in high quality in the school itself. In other cases, partial scans of yearbooks can be found, as alumni of La Salle in Santander have

[36] There are exceptions. See: D. Marchesini, *Gli Annuari delle scuole medie superiori di Parma durante il fascismo*, in N. Raponi (ed.), *Scuola e Resistenza*, Parma, La Pilotta, 1978, pp. 125-132, in partic. p. 126; D. Marchesini, *Una fonte per la storia della scuola fascista: gli "annuari" di Cremona e Parma*, «Rivista di storia contemporanea», n. 1, 1980, pp. 88-111, and S. González, F. Comas, P. Fullana, *La «construcció» del record escolar a través de la fotografia: «desconstrucció» de dos anuaris col·legials*, in Comas, González, Motilla, Sureda (edd.), *Imatges de l'escola, imatge de l'educació*, cit., pp. 159-170. Likewise, yearbooks have been used in commemorative books put out by some schools: P. Dávila, L.M. Naya, H. Murua, *Bajo el signo de la educación. 100 años de La Salle en Gipuzkoa*, Donostia, Distrito de Bilbao, 2009; J. Burrieza, *Lourdes, stella in Castella. Historia del Colegio Nuestra Señora de Lourdes de Valladolid*, Valladolid, Ayuntamiento de Valladolid, 2009; J.M. Según, J. Santaeulàlia, *Cent anys de La Salle Bonvanova (1989-1989)*, Barcelona, Joan Santaeulália, 1989; F. Ríos, F. Gastaminza, *Cien años de presencia marianista en San Sebastián*, Madrid, Editorial SM, 1987; J.R. Rodríguez, *Más que un colegio. Los maristas en Vigo 1913-2013*, Vigo, Edelvives, 2014; and J. Echevarría, *Cien años con nosotros. Don Bosco en Barakaldo*, Barakaldo, Ediciones de la Librería de San Antonio, 1998.

[37] <https://memoriasclubdeportivodebilbao.blogspot.com/2013/01/el-colegio-santiago-apostol-de-bilbaosu.html> (last access: 10.02.2020).

[38] <http://escolapios-santander.org/somos/el-colegio/memorias-escolares/114> (last access: 10.02.2020).

done[39], covering the period between 1940 and 1975 (the year in which the last yearbook was published).

Moreover, as we have argued in other articles, yearbooks are useful for reconstructing certain educational practices in religious, artistic and cultural activities[40]. Most of the work that has been done on these issues refers to the Francoist era, which was particularly bright for these schools[41]. In order to summarize the value to be found in using these yearbooks, a question must be raised regarding the way in which these types of school activities have been discussed historically. In general, this has been done in terms of discussing curricula or in the application of certain regulations on physical education, religious or patriotic teaching etc.; as such we could say there is a reaffirmation of National Catholicism. However, the yearbooks allow us to analyse the whole set of activities simultaneously. Thus, in studying the implementation of the 1945 Primary Education Act, it is difficult to obtain documentary evidence from private schools about the knowledge areas established in Article 37: instrumental, which covers interpretative reading and graphic expression, and formative, which covers: religious formation, formation in national spirit, intellectual formation (the National language and mathematics), and physical education (gymnastics, sports and structured games). Insofar as the History of Education has set itself the task of finding traces of school practices in relation to a legislative framework[42], yearbooks are a useful tool for understanding how they were implemented in private religious schools, since the curriculum is the nucleus around which such school practices are carried out in relation to a legislative framework.

The yearbooks are a good reflection of the approach taken toward religious activities in a context of Marian fervour, where religious practices were manifested in catechetical contests, spiritual exercises and conviviality, religious actions and additional apostolic works[43]. We find a good example of this in the 1949-50 yearbook from Colegio Nuestra Señora de la Bonanova in Barcelona, which contain references to religious associations (Acción Católica, Congregación Mariana, Congregación del Santísimo Niño Jesús, among

[39] <http://aalasallesantander.blogspot.com/p/blog-page.html> (last access: 10.02.2020).

[40] P. Dávila, L.M. Naya, H. Murua, *Prácticas y actividades religiosas en los colegios privados del País Vasco durante el siglo XX*, «Historia y Memoria de la Educación», n. 4, 2016, pp. 141-175.

[41] S. Ramos, T. Rabazas, C. Colmenar, *Fotografía y representación de la escuela privada madrileña en el franquismo. Entre la propaganda y el relato*, «Historia y Memoria de la Educación», n. 8, 2018, pp. 397-448; S. Ramos, T. Rabazas, *The invention of the educational tradition in religious Madrid elite schools. Identity and distinction of the private school culture during Franco's dictatorship*, «History of Education and Children's Literature», vol. 14, n. 1, 2019, pp. 333-358.

[42] M.M. del Pozo, T. Rabazas, *Políticas educativas y prácticas escolares: la aplicación de la Ley de Enseñanza Primaria de 1945 en las aulas*, «Bordón», vol. 65, n. 4, 2013, pp. 119-133.

[43] Dávila, Naya, Murua, *Prácticas y actividades religiosas*, cit.

others), all of which were part of the program of Christian education that was promoted by the De La Salle Brothers and other religious institutes[44].

The information provided in the yearbooks allows us to access a set of associations, classroom practices, attendance at religious activities, membership in apostolic associations, etc., which are otherwise unavailable to the historian of education. In this sense, the apostolic activity not only linked students to their own orders or congregations but it also contributed to their ability to coexist with groups of laymen and laywomen in religious, and in some cases political, activities, which made it possible to extend religious activity beyond the school setting. The ultimate objective of all religious association, together with the Eucharistic celebrations and spiritual exercises, was to involve children, adolescents and young people in an experience of faith that would ensure the defence of the Catholic religion within an organizational framework in which the ecclesiastical hierarchy (from the bishops to the priests), the orders and religious congregations dedicated to teaching and the students' own families were involved in sharing the project of Catholic unity.

Similarly, a study that approaches school sports from the information provided in the yearbooks would yield very interesting data on how masculinity has been shaped through physical mastery. Physical education, in the broad sense of the 1945 law, made it possible to develop an amalgam of school practices during the recreation period or during physical education class, which in these schools was run by staff attached to the Falange. The sheer volume of references, photographs, competitions, contests, etc. given to athletics and physical education in these schools is in stark contrast with the little attention given to physical or art education in public schools. The national surveys on primary education in 1953, which correspond to the implementation of the aforementioned 1945 law, are curious because it can be seen that:

> […] the elaboration of the programmes for most of the formative and complementary subjects (Formation of National Spirit, Physical Education, Labour, Home Economics, Music, Hygiene) was not considered the competence of the commission, but it was entrusted to the institutions supporting the regime, such as the Falange and the Women's Section, while the ecclesiastical hierarchy was responsible for Religion[45].

The iconographic contribution made by the yearbooks is of a spectacular richness, especially if we consider that, at that time, the challenge of photographing moving bodies required great photographic expertise. The fact that these photographs were accompanied by texts that situate the activity within a context of competition between schools or commemorative displays provides an added value that is of unquestionable historiographical interest.

[44] Colegio de Nuestra Señora de la Bonanova, *Memoria Escolar 1949-1950*, Barcelona, Colegio de Nuestra Señora de la Bonanova, 1950, pp. 46 and ss.

[45] del Pozo, Rabazas, *Políticas educativas y prácticas escolares*, cit., p. 123.

Therefore, photography's role as a support to discourse corroborates what del Pozo[46] said in relation to the photographs in the yearbooks, which gives them a clear propagandistic purpose. A summary of the value of this type of activity can be found in a yearbook from the Colegio Nuestra Señora de la Bonanova:

> Loyal to a healthy pedagogy, which makes sport a teacher of character and virtue, according to Pius XII, and which he considers to be an obligatory combustion of the sedentary nature imposed by the burden of studies, our regulations grant ample margin and favour, always within the framework of coexistence and the care of the Brothers, sports competitions with other entities, such as the Diocesan Catholic Action, Schools and even the Regional Sports Federation[47].

The type of sport practiced at these schools was, thus, an indicator of their greater or lesser prestige and, in some cases, certain schools specialized in various sports. Whether a school offers classes in fencing, hockey or ping-pong indicates the level of quality of the schools' facilities and with it the type of students they serve; a striking case is the fact that the first basketball hoop to be installed in the city of Valladolid was acquired by Colegio de Lourdes. To provide instruction and training in these activities, schools relied on athletic instructors, remedial fitness practitioners and medical staff. Given the wealth of information contained in the yearbooks regarding sports and athletics, the construction of a school's athletic and sports history would be greatly facilitated by consulting those sources.

Conclusions

Access to a collection of documents that includes a corpus of the 1,200 yearbooks housed in the Museum of Education at the University of the Basque Country has allowed us to analyse the potential of these documents as a primary source in reconstructing the history of education, especially with regard to private religious school in a time frame that ranges from the 19th century to the present, with a large proportion of the yearbooks dating from the middle period of the 20th century in Spain.

The yearbooks are multi-faceted, providing us with concrete information and data about many aspects of school practice. Through these texts we can analyse schools' marketing intentions and practices, as well as their infrastructure (buildings, furnishings, laboratories, etc.). Likewise, yearbooks can be analysed as a means of building a school's brand, each one's identity corresponding to the

[46] Del Pozo, *Imágenes e historia de la educación*, cit., p. 302.

[47] Nuestra Señora de Bonanova, *Memoria escolar del curso 1949-50*, Barcelona, Colegio de Nuestra Señora de la Bonanova, 1950, p. 48.

religious order or congregation it belongs to. Our focus in this article has been centred on the use that can be made of the yearbooks in order to understand the school practices in these types of schools. To that end, we have shown that the yearbooks are a type of printed document that records institutional memory, is produced primarily by school directors and then distributed each academic year to families, conveying a historical account not so much of daily life and the experiences of school practices but rather of a set of practices and activities that have brought the greatest distinction to the schools, such as religious, athletic or cultural activities. The yearbooks use photographs of individual students or groups of students to convey a feeling of belonging to the school, along with public recognition of the awards obtained by students for school activities, which we have called the Facebook without internet.

To explain this phenomenon, we have highlighted the materiality of the historical document itself, in terms of the yearbooks' title, content, interpretative value, typology, authorship and purpose. We have also highlighted that the yearbooks have a structure that, despite having changed over the years, maintains constant lines, especially with regard to photographs of students. We have also stressed the potential value for analysis that is offered by the graphic presentation of the yearbooks, since the combination of text and photography represents a very interesting intertextuality for analysing school practices. Finally, we have outlined some examples of how yearbooks have been used in the field of the History of Education to study school practices such as physical education or religious activities.

The past and the present: a historical outline of Polish research into translations of children's and young adult literature

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The past and the present: a historical outline of Polish research into translations of children's and young adult literature. Introduction

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ABSTRACT: The purpose of this contibution is to examine the historical outline of Polish research into translations of children's and young adult literature, especially between the XXth and the XXIst century. Thanks to several scholar and translator, in the last fifty years these studies have been increased, also in an international way. The contributors report on their research findings and identify the reasons behind the presence or absence of certain translations of children's and young adult literature in Poland; in fact, the dynamic development of Polish research into translations for young readers interwines different connections, for example, with Western children's literature, with the censorship or with the field of illustred books for children.

EET/TEE KEYWORDS: Children's and young literature; Polish literature; Translation studies; Poland; XXth-XXIst Centuries.

Children's and young adult literature scholarship and translation studies have already cemented their status as recognised and recognisable research fields and university departments worldwide[1].

[1] See e.g. N. Paprocka, *Ricerche polacche sulle traduzioni di letteratura per l'infanzia e*

Research into translations of children's and young adults' literature in Poland is neither as extensive nor as varied as in English-speaking countries. However, the field boasts an impressive fifty-year-long tradition dating back to the 1960s, when it was initiated by Polish literature scholars Krystyna Kuliczkowska and Stanisław Frycie, and the translator of French and Italian literature Olga Nowakowska. The year 1970 saw the publication of Zdzisława Brzozowska's milestone book entirely devoted to the study of the editorial reception of Hans Christian Andersen's works in Poland. Academic inquiries into translations for children and young adults were picked up and further disseminated by Seweryn Pollak, Stanisław Barańczak and Robert Stiller in the 1970. In the 1980s, the community of children's and young adult literature scholars received an important addition in Jerzy Jarniewicz and Monika Adamczyk-Garbowska, eminent researchers and translators.

As observed by Natalia Paprocka, the 1990s were marked by a dynamic development of Polish research into translations for a young readership, which resulted in a proliferation of studies (primarily books) that mostly explored translations of 'dominant' – English, German and French – literatures. Though pivotal, they were not an exclusive object of study; for example, translated Swedish literature for a young reading public was investigated by Ewa Teodorowicz-Hellman. In that period, the subdiscipline was a near monopoly of literary scholars and linguists, whose research was predominantly normative.

While these normative tendencies prevailed in Polish research into translations of children's and young adults' literature until the end of the millennium, a remarkable cultural shift took place in the early 21st century, triggered by late 20th-century transformations in translation studies. It was then that Polish scholars began to examine how foreign cultures were presented in translated fiction for a young readership. For instance, they focused on translations of proper names, forms of address, culinary terms and, as aptly shown by Paprocka, «other components of material reality, stereotypes and customs». Ample attention was also devoted to wordplay and humour in translation[2].

The first two decades of the 21st century witnessed the publication of several important Polish studies which opened up new perspectives in scholarly reflection on translated children's and young adult literature. Previously the sole domain of literary scholars and linguists, the field was given a new thrust by contributions from bibliologists, who addressed translations of imported children's and young adults' literature from the viewpoint of publishers[3].

l'adolescenza: il bicchiere mezzo vuoto o mezzo pieno?, «Italica Wratislaviensia», vol. 8, n. 2, 2017, pp. 141-164; Ead., *Sto lat przekładów dla dzieci i młodzieży. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1981-2014)*, Kraków, Universitas, 2018.

[2] Paprocka offers a meticulous list of relevant papers and books by Polish scholars published between 2000 and 2012. See Paprocka, *Sto lat przekładów dla dzieci i młodzieży. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1981-2014)*, cit., pp. 28-29.

[3] For more information on Polish bibliological research, see e.g. E. Jamróz-Stolarska,

Since then, discourse on translation has generated multiple books, chapters in collected volumes and papers in specialist journals («Przekładaniec: A Journal of Literary Translation», n. 16, 2006 and n. 21-22, 2010; «Filoteknos»; «Dzieciństwo. Literatura i Kultura»; «Czy/tam/czy/tu»). Polish researchers have primarily examined translations from English (e.g. studies by Anna Fornalczyk) but have also exhibited a considerable interest in French literature (translations of Antoine Saint-Exupery's *The Little Prince*, *Asterix* comic books, Jules Verne's novels, etc.). In 2018, Paprocka published a landmark book exploring one hundred years' worth of Polish translations of French literature for young readers and the publishers involved in their production[4]. Sylvia Liseling-Nilsson and Hanna Dymel-Trzebiatowska have analysed Polish translations of Astrid Lindgren's works, which are among Polish children's favourite reads. Eliza Pieciul-Karmińska has focused on the study of Polish translations of German children's and young adults' literature, especially examining the Brothers Grimm's tales in Polish literary history. A comprehensive account of the history and contexts of translations of Italian children's literature in Poland was produced by Monika Woźniak, Katarzyna Biernacka-Licznar and Bogumiła Staniów in 2014[5]; and in 2018, Biernacka-Licznar published an extensive study of Polish translations of Italian fiction for children and young adults in 1945-1989[6].

Besides prior research inspirations, the latest Polish studies of translated children's and young adults' literature draw on a varied range of approaches developed and used in general translation studies. For example, Majdzik and

Serie literackie dla dzieci i młodzieży w Polsce w latach 1945-1989: produkcja wydawnicza i ukształtowanie edytorskie, Warszawa, SBP, 2014; M. Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, in G. Gzella, J. Gzella (edd.), *Nie należy dopuszczać do publikacji. Cenzura w PRL*, Toruń, Wyd. Naukowe UMK, 2013, pp. 99-122; M. Rogoż, *Fantastycznie obecne. Anglojęzyczne bestsellerowe cykle powieściowe dla dzieci i młodzieży we współczesnej polskiej przestrzeni medialnej*, Kraków, Wyd. Naukowe UP, 2015; I. Socha, *Polskie przekłady dla dzieci i młodzieży w latach 90*, in J. Papuzińska, G. Leszczyński (edd.), *Kultura literacka dzieci i młodzieży u progu XXI stulecia*, Warszawa, CEBID, 2002, pp. 205-215; B. Staniów, *Książka amerykańska dla dzieci i młodzieży w Polsce w latach 1944-1989. Produkcja i recepcja*, Wrocław, Wydawnictwo Uniwersytetu Wrocławskiego, 2000; B. Staniów, *Tłumaczenie polskiej książki dla dzieci i młodzieży w repertuarze zagranicznych wydawców w latach 1928-1937 (wybrane zagadnienia)*, in M. Komza *et alii* (edd.), *Oblicza kultury książki. Prace i studia z bibliologii i informacji naukowej*, Wrocław, Wydawnictwo Uniwersytetu, 2005, pp. 301-315; and B. Staniów, *Z uśmiechem przez wszystkie granice. Recepcja wydawnicza przekładów polskiej książki dla dzieci i młodzieży w latach 1945-1989*, Wrocław, Wydawnictwo Uniwersytetu Wrocławskiego, 2006.

[4] See Paprocka, *Sto lat przekładów dla dzieci i młodzieży. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1981-2014)*, cit., p. 34.

[5] M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, Toruń, Adam Marszałek, 2014.

[6] K. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, Warszawa, SBP, 2018.

Słapek's study of 2015 employs elements of linguistic theories; Skibińska, Heydel and Paprocka's two-volume collection published in 2015 investigates the notion of the translator's voice; and Biernacka-Licznar and Paprocka ground their argument on the theory of cultural repertoire and Pierre Bourdieu's sociology (2016a, 2016b). Polish scholars are also increasingly more eager to analyse translations of picture books, even though there are not many of them on the Polish market yet[7].

Effective attempts have been undertaken to compile surveys of studies on translations of children's and young adult literature in Poland. Such overviews have prominently been provided by Monika Woźniak, who assembled a bibliography of books and papers scrutinising translations of children's literature published in Polish and in Poland[8] and offered a concise outline of the evolution of the field in Poland[9]. In 2018 Natalia Paprocka published a comprehensive review of Polish studies on translations of children's and young adults' literature, drawing an inclusive timeline of the development of Polish research into translated children's and young adult literature, starting from its beginnings in the 1960s, through its dynamic growth at the turn of the millennium, and ending with 2017. Notably, almost three hundred research publications in Polish or other languages[10] by Polish scholars[11], focused on issues in translations of children's and young adults' literature appeared by the end of 2019.

This section includes five papers authored by researchers of the University of Wrocław and the University of Warsaw who share an avid interest in translations of children's and young adult literature. Four contributions discuss themes related to translations from various languages: Italian, French, English and Dutch. One contributor offers a study titled *One hundred years of*

[7] See e.g. H. Dymel-Trzebiatowska, *Inne życie inaczej, czyli o przymusie naturalizacji na przykładzie tłumaczenia szwedzkiej książki obrazkowej*, in A. Pstyga (ed.), *Słowo z perspektywy językoznawcy i tłumacza*, Gdańsk, Wydawnictwo UG, 2012, pp. 171-178; J. Szyłak, *To ptak! To samolot! To ikonotekst! Książka – komiks – picturebook (medium czy media?)*, in I. Kiec, M. Traczyk (edd.), *Komiks i jego konteksty*, Poznań, Fundacja Instytut Kultury Popularnej, 2014, pp. 11-22; K. Zabawa, *Rozpoczęta opowieść. Polska literatura dziecięca po 1989 roku wobec kultury współczesnej*, Kraków, Akademia Ignatianum – Wydawnictwo WAM, 2013; P. Łapiński, *Przekład towarzyszący. O pozycji tłumacza w świecie literatury obrazkowej dla najmłodszych*, «Przekładaniec» n. 34/2017, pp. 70-87 doi:10.4467/16891864PC.17.004.8210; K. Biernacka-Licznar, E. Jamróz-Stolarska, N. Paprocka, *Lilipucia rewolucja*, Warszawa, SBP, 2018.

[8] M. Woźniak, *Przegląd bibliograficzny polskich i wydanych w Polsce prac i artykułów o przekładzie literatury dziecięcej*, «Przekładaniec», n. 22-23, 2009-2010, pp. 283-292.

[9] M. Woźniak, *Czym jest „poprawność polityczna" w przekładach literatury dziecięcej?*, in K. Hejwowski, A. Szczęsny, U. Topczewska (edd.), *50 lat polskiej translatoryki*, Warszawa, ILS UW, 2009, pp. 510-511; Woźniak, Biernacka-Licznar, Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, cit., pp. 12-15.

[10] I mean publications in English, German, French and Italian.

[11] Natalia Paprocka (2018) uses the term «Polish researchers» to denote «researchers affiliated with Polish universities» and scholars who embarked on their careers in Polish academia and continue them abroad (e.g. Monika Woźniak, Sylvia Liseling-Nilsson).

illustrated books for children in Poland: An analysis of the publishing market in the years 1918-2018, in which she outlines the historical development of illustrated books for children and young adults published in Poland over the last century.

This publication aims to afford readers a glimpse at selected research into translations of children's and young adults' literature conducted in Poland. Each contribution seeks to offer a comprehensive view of a certain topic. The papers are highly varied, not only showcasing the authors' scholarly interests but also demonstrating their sources of inspiration and the developmental directions of current scholarship.

The contribution by Ewa Nicewicz-Staszowska, a children's and young adults' literature scholar and a translator of fiction for a young readership, explores translations of Italian children's and young adult literature in Poland after 2000, specifically between 2000 and 2018. In a way, her analysis is a continuation of prior research carried out by Woźniak, Biernacka-Licznar and Staniów (2014) and individually by Biernacka-Licznar (2018). Nicewicz-Staszowska relies on the data of the Polish *Przewodnik Bibliograficzny* [Bibliographic Guide], which registers non-serial publications that appear on the Polish publishing market. Her discussion of these resources paints an optimistic image of the dynamic of translations of Italian children's and young adults' literature, whose number has steadily been increasing in recent years. The map of translations charted by Nicewicz-Staszowska features the towering position of Collodi's *Pinocchio*, a considerable popularity of literary protagonists created by Pierdomenico Baccalario, Gianni Rodari's conspicuous come-back and an increasing proportion of Italian picutrebooks on the Polish publishing market. Nicewicz-Staszowska devotes a lot of attention to Nasza Księgarnia, one of major Polish publishers for young readers, whose operations are also discussed by Paprocka, Biernacka-Licznar and Elżbieta Jamróz-Stolarska.

Justyna Łukaszewicz, a Wrocław-based researcher of Collodi's and De Amicis's works, chose a different thematic concern. Her paper examines Polish translations of Bianca Pitzorno, whose reception in Poland she assesses as irregular and rather random. Łukaszewicz begins by emphasising that she seeks to analyse all Polish translations of Pitzorno's works together with their peritexts, with a special focus on anthroponyms. Subsequently, she goes on to thoroughly describe the techniques applied by Polish translators, whereby she fills the gap in the studies of Pitzorno's life and work available in Poland. The theoretical underpinnings of Łukaszewicz's study are provided by the methodology developed by Christiane Nord and Laura Cantora.

Paprocka and Biernacka-Licznar's contribution aims to identify the ways in which the censors of the Central Office for the Control of the Press, Publications and Performances assessed translations of books for children and young adults from behind the Iron Curtain to be published in People's Poland under Stalinism (1948-1956). The researchers affiliated with the University of Wrocław seek to

establish whether the assessment criteria applied to books by Western authors differed from those used for Polish writers and translations from Eastern-Bloc languages. Their study is based on the analysis of over fifty censorial reviews of books translated primarily from French and Italian, and also from English, most of which were (supposed to be) released by Nasza Księgarnia, the chief publisher of literature for a young readership in People's Poland. The theme they address augments the understanding of complex relations between censorship and literature in Poland, especially illuminating censors' approach to translated children's and young adults' literature.

In her contribution, Irena Barbara Kalla presents a thorough historical scrutiny of translations of Dutch and Flemish literature into Polish, starting from 1805 and ending with 2019. Informed by the sociology of literature and, in particular, by Pascale Casanova's concepts, Kalla's study relies on the theoretical model of the literary world-system to argue that few scholars study the cultural transfer of Dutch children's and young adult literature from periphery to periphery. Attending to local mechanisms, institutions, actors and networks, her research into Polish translations for the child reading audience yields four important conclusions concerning the mediation of the centre in the transfer of translations.

The presentation of the Polish landscape of translations of children's and young adults' literature is completed by Jamróz-Stolarska's paper, which offers an overview of the century-long history of the development of illustrated books for children and young adults in Poland. Drawing on Michael Bhaskar's theoretical framework and Hans-Heino Ewer's model of literary communication for children, Jamróz-Stolarska examines the impact of political, social and economic changes on the evolution of the publishing repertoire and on the editorial design of children's books. With her focus on major trends, styles and tendencies in book illustrations for young readers, Jamróz-Stolarska tackles the challenge of capturing the opulent, century-long history of transformations on the Polish market of illustrated children's books in the fixed word count of the publication.

All these texts first and foremost represent the wide range of translation studies-related themes and issues in children's and young adults' literature. The contributors thoroughly and inquisitively report on their research findings and identify the reasons behind the presence or absence of certain translations of children's and young adult literature in Poland. They showcase modern research methodologies in their practical interpretive applications, and their observations prove that a given national literature is enriched «by as many authentic literary works as there have been translations»[12].

[12] Quoted in P. de Bończa Bukowski, M. Heydel (edd.), *Polska myśl przekładoznawcza. Antologia*, Kraków, Wydawnictwo Uniwersytetu Jagiellońskiego, 2013, p. 19.

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Is more always better? Translations of Italian children's literature in Poland after 2000. Selected aspects

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ABSTRACT: The aim of this paper is to show how the Polish publishing market of children's books translated from Italian evolved in the period from 2000 to 2018. It asks questions about whether the market dominated by classic Italian authors such as Collodi, De Amicis and Rodari, or by less famous contemporary authors; who is publishing, how often, and what the typical print runs are. The editorial policy is shown on dates from «Bibliographic Guide» and «Polish Publishing in Figures», from interviews conducted with members of Polish publishing staff and, last but not least, takes a closer look at the cult publishing house Nasza Księgarnia – the most important publisher in the People's Republic of Poland, also active after the fall of communism.

EET/TEE KEYWORDS: Italian children's literature; Translations; Publishing market; Poland; XXI[st] Century.

> […] translation is likely to become one of the means of elaborating the new repertoire. Through the foreign works, features (both principles and elements) are introduced into the home literature which did not exist there before.
> Itamar Even-Zohar

Introduction

Translation is a bridge connecting cultures, often those that are distant from one another[1]. As Even-Zohar notes not only is translated literature an integral

[1] E. Nida, *Toward a science of translating. With special reference to principles and procedures*

system incorporated in every polysystem of literature, it is actually the most active component thereof, effectively involved in the formation of the core of that polysystem[2]. This means that the role of translation cannot be overemphasised, and the development of cultural canons through translation is definitely real, also in the case of children's and young adult literature. The purpose of this article is to present the prevailing tendencies on the Polish publishing market from 2000 to 2018 concerning translations of Italian literature for young readers. In this article, I have not covered the topic of how these translations were received, as that, given its extensive scope, would require a separate paper. The entrance point was the research already completed, published primarily in two important monographs: *Translations in the System of Small Literatures* by M. Woźnika, K. Biernacka-Licznar, B. Staniów (2014) and *Pinocchio's Heart* by K. Biernacka-Licznar (2018) as well as, indirectly, in *The Lilliputian Revolution* by K. Biernacka-Licznar, E. Jamróz-Stolarska, N. Paprocka (2018). However, I have decided to focus on the least studied period, namely the perspective from 2000 to 2018. I acquired the data for my research mainly from «Bibliographic Guide», which is the primary element of Poland's current national bibliography that records monographic publications on the basis of a mandatory copy received by the National Library of Poland, as well as from «Polish Publishing in Figures», an annual paper about the books and periodicals published in Poland. The discussions I have had with translators, editors and publishers were important, as they helped me understand the current status and tendencies prevailing on the Polish publishing market. When commencing my work on the issue, I was fully aware that a research project focused on contemporary matters is predestined to be somehow incomplete, given that the data is continuously being updated. In fact, the very object of my research turned out to be problematic as well, as I encountered the hybridisation of genres and blurred national borders, which I will be discussing further in this paper. These issues, as well as the enormous body of literary productions mean that the numerical data quoted in this paper should be treated as approximations only. On the other hand, the findings appear to be accurate enough to be able to distinguish the prevailing trends on their basis, demonstrating the operation of certain mechanisms and drawing an overall picture of Polish translations of Italian literature for children and young adults. In order to deliver a more precise illustration of how the mechanisms of the Polish publishing market functioned during the period in question, I decided to take a step back in time and take a look at the situation after 1989, as this had a direct impact on what happened at the beginning of the new millennium. The general image is

involved in Bible translating, Leiden, E.J. Brill, 1964, p. 167.

[2] See I. Even-Zohar, *The Position of Translated Literature within the Literary Polysystem*, in *Polysystem Studies*, «Poetics Today», vol. 11, n. 1, Durham, Duke University Press, 1990, pp. 45-46.

finally supplemented with an in-depth analysis of Polish translations of Italian children's and young adult literature from 2000 to 2018 by Nasza Księgarnia, one of the key publishers in Poland.

1. *The flood, or the wild West on the Polish publishing market*

The fall of Communism in Poland saw fundamental changes to all areas of Polish life and the economy, including to the Polish publishing market. As a result of the systematic and political transformation, a market economy was introduced in 1989, with the rapid formation of private companies and unrestricted imports and exports. Western Europe and the United States lifted the embargo on advanced technology exports to Poland, thus allowing the purchase of advanced hardware and software, including printing machinery. Finally, the Central Office for Control of the Press, Publications and Performances, which had been in operation since 1946, was closed in May 1990, marking the ultimate end of censorship and giving a green light for free publishing business activity[3]. As of 1990, books, periodicals and other publications became a commodity like any other, while publishing activity became a service based on market economy principles. The fall of Communism further resulted in the end of the State monopoly in the publishing sector[4]. As Joanna Olech ironically states, «Anyone who was alive would take up publishing, and nobody ever asked about high school graduation, qualifications, or experience»[5]. After years of deficit – the people's power even controlled the paper quota, thus determining the circulations and availability of books – an enormous volume of book production was launched, usually devoid of any literary or artistic value. The market was dominated by Disney productions for many years[6], and the whole period, i.e. the first decade of the free market economy, has come to

[3] For more about the establishment and functioning of censorship in Poland see K. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, Warszawa, SBP, 2018, pp. 45-78.

[4] See J. Sadowska, *Wybrane aspekty polskiego rynku wydawniczego po 1989 roku w* świetle *statystyki*, «Zagadnienia Informacji Naukowej», n. 2, 2004, p. 30. The condition of the Polish publishing market of the 1990s is thoroughly analyzed by Joanna Papuzińska in the chapter entitled *Polska literatura dziecięca w latach dziewięćdziesiątych*, in G. Gorschenek, M. Gorschenek, H. Hilzheimer (edd.), *Almanach polskiej kultury dziecięcej*, Hamburg, Katholische Akademie, 1996, pp. 157-159.

[5] J. Olech, *Ilustracja polska po potopie*, in D. Świerczyńska-Jelonek, G. Leszczyński, M. Zając, *Po potopie. Dziecko, książka i biblioteka w XXI wieku*, Warszawa, SBP, 2008, p. 192.

[6] «In 1994 […] Disney fairy tales were most popular among the youngest readers. The colourful versions of *Beauty and the Beast*, *Robin Hood*, *Cinderella* and all the other works published in this series were a true sensation among readers». D. Świerczyńska-Jelonek, *Co czytają polskie dzieci? Wybrane problemy czytelnictwa współczesnego młodego pokolenia*, in Gorschenek *et alii*, *Almanach polskiej kultury dziecięcej*, cit., p. 166.

be referred to as 'the flood' by researchers, for the reasons set out above[7]. Here is what Olech writes about it, with great insight:

> With the political transformation of 1989, publishing houses – as a peculiar bygone of the People's republic economy, were flooded by the high wave of change. The State-owned publishing houses, thrown out of their safe zone, lost their preferential monopolist positions all of a sudden and had to face the nuisance of private entrepreneurship, ripping off large pieces of the bookstore market cake voraciously and without mercy. Bookstore shelves were now full of trash colourful publications, cheap Asian kitsch, unprofessional translations and treacherous reprints, published in violation of any copyrights. […] The first decade of the free market was like immoderate gluttony after years of strict diet[8].

The early 1990s witnessed a sudden revival of the Polish publishing market's contact with Italy. There were many Italian publications among the co-prints (books published under a foreign licence, in an identical graphic format) that were very popular during that time. As noted by the curators of the exhibition called *Pinocchio's Heart*, dedicated to Italian literature for children, which was presented in 2014 in Krakow and 2015 in Wroclaw: «These editions lured readers with their colourful covers and pictures, which were something new in Poland after the dull publications on newspaper-grade paper, prevailing during the crisis of the 1980s, yet both the aesthetic quality of the illustration and, above all, the quality of the texts, translated carelessly and in a hurry, was often embarrassingly low»[9]. Another phenomenon, very interesting from my perspective, became even stronger in the 21st century, namely the blurring of the borders of nationality. Both in the 1990s and in the present, the only indicator of 'Italianism' in this category of publications is the source country from which a specific title is imported for translation. These are often modifications of classic fairy tales such as *Little Red Riding Hood* or *Cinderella*, or adaptations of international classics such as Verne or Stevenson, which do not in fact have anything in common with Italian literature, though this is how they are classified in the National Library catalogue, strongly hindering research on translations of Italian literature for children and young adults in Poland, additionally obscuring the overall view of the situation during the discussed period. During the 'flood' years, other than reissues of *Pinocchio* by Collodi, *Heart* by De Amicis and a few novels by Salgari (on a side note, these were published as translations made before 1939, for cost efficiency reasons), practically no books

[7] «The 1990-2000 decade is a period of a true 'flood' – apathy and inertia expressed in publishing a limited and frequently poor quality range of books, mainly 'stale' classics by Polish authors, or translated works, often not particularly sophisticated (yet most intently supported by the TV or cinema)». M. Zając, *Książka czasu przemian*, in Świerczyńska-Jelonek, Leszczyński, Zając (edd.), *Po potopie. Dziecko, książka i biblioteka w XXI wieku*, cit., p. 195.

[8] Olech, *Ilustracja polska po potopie*, cit., p. 192.

[9] See K. Biernacka-Licznar, M. Woźniak, M. Wrana, *Serce Pinokia. Włoska literatura dziecięca w Polsce* (exhibition catalogue), Kraków, 2014, pp. 16-17.

were published that we could consider part of the canon[10]. Instead, there were massive imports and translations of books for the youngest children (including board books), fairy tales and adaptations of the classics, as well as religious and popular science publications[11].

2. *On the eve of the new millennium – the Lilliput revolution*

The stagnation and inertia that characterised the market of children's books in the 1990s began to gradually disappear in the early 21st century[12]. Joanna Olech notes that, «After a decade of poor harvest (or rather an abundant harvest of junk), there was a salutary change on the market of children's books. Some kitsch producers were somehow rehabilitated, empty-headed marketing experts lifted their heads out of their Excel tables, someone was moved by a nice-looking book from Bologna and wanted to publish a similar one»[13]. It was not only due to the continuously increasing interest in the topic of artistic works for children among literary critics and academic humanists, and not only due to the persistent activity, particularly after 1993, of the Polish Section of IBBY[14], but also due to several important projects, namely the «All of Poland Reads to Kids» campaign launched in 2001[15], the development

[10] Although the first full Polish edition of Gianni Rodari's *Telephone Tales* was published in 1996, as a result of the efforts of the Kleks Publishing House of Bielsko-Biała, it went practically unnoticed, due to the far from perfect quality of translation and illustration.

[11] See M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Bibliografia edycji dla dzieci tłumaczonych z języka włoskiego na język polski wydanych w latach 1945-2012*. The bibliography produced in 2014 by a team of researchers from Wroclaw, covering the period from 1945 to 2012, was available online for the first two years but was never printed.

[12] See M. Zając, *Rynek wydawniczy w dziedzinie książki dla dzieci – dobra zmiana*, «Guliwer», n. 1, 2007, p. 31, and G. Leszczyński, *Literatura dla młodych odbiorców 1990-2006*, «Guliwer», n. 1, 2007, pp. 33-34, and Olech, *Ilustracja polska po potopie*, cit., p. 193.

[13] J. Olech, *Wydawnictwa lilipucie*, «Tygodnik Powszechny» (in «Książki w Tygodniku», an extra dedicated to books), n. 14, 3 April 2005, p. 20.

[14] The Polish Section of the International Board on Books for Young People was established in 1973, but before 1993 it was probably operating as an ordinary association (not requiring registration in the registry of associations), or as an agenda of the Minister of Culture and Art, based on the statute of IBBY. In January 1993, fifteen founding members of the Society of Supporters of Books for Young People – the Polish Section of IBBY adopted the first statute of their society and elected a founders committee, which was assigned the task of registering the society. The founders committee was composed of the Warsaw University staff: Marcin Drzewiecki, Grzegorz Leszczyński, Joanna Papuzińska, Michał Zając. See <http://www.ibby.pl/?page_id=3437> (last access: 3.01.2020).

[15] A public campaign launched on 1st June 2001 by the Foundation «ABCXXI – All of Poland Reads to Kids», which has had a significant impact on the market of children's books. The goal of the campaign is to promote public awareness of the enormous importance of reading to children for their healthy and integrated growth. Through its advertising spots, videos featuring famous actors, music videos and educational programs targeted at kindergartens and schools, the Foundation

of a «Children's and Youth Books Canon» in 2003, and Poland's national presentation at the Bologna 2003 International Children's Book Fair. However, the most important impulse that has brought about the revolutionary change on the Polish book market was the emergence of a new type of publisher – 'Lilliput-sized' publishing houses[16]. In response to the market oversaturation with «cheap editions monotonously copying the Disney style»[17], in a search for more ambitious literature, new publishing houses were opened by enthusiasts, operating for satisfaction rather than for profit (Ezop was the first, followed soon after by Muchomor, Hokus-Pokus, FRO9, Wytwórnia, Dwie Siostry, and many others). Although the majority of publishing production in Poland was still a long way off the dreams of visionary writers, artists or graphic designers in the early 21st century, the operations of these 'Lilliputs' on the Polish market led to the appearance of more ambitious books in Poland, more elitist and targeted at more sophisticated customers. The publishers' repertoires encompassed works by Polish and foreign writers (quite frequently translated from minor languages), older and more contemporary works, world classics and new discoveries, publications from various genres, covering an extensive range of topics[18]. A feature shared by all these publications was their high editing, artistic and literary quality. The proactive attitude of the 'Lilliputs', arousing intense interest among critics and readers, further livened up the previously faint debate on the state of books for children and young adults in Poland. In 2005, Joanna Olech could already write the following: «The Lilliput publishing houses, built on enthusiasm and passion for books, supported by friends and families, are transforming the image of the domestic market of children's books»[19]. These publishers' activities were soon appreciated not only

encourages parents and teachers to read to children every day for at least 20 minutes (the famous catchphrase is: «20 minutes daily. Every day!»). In addition, the Foundation hosts numerous educational conferences and workshops for parents, teachers and psychologists across Poland. In 2006, they launched the Astrid Lindgren Literary Contest for the best contemporary book for children and young adults. Together with «Polityka» weekly, the foundation published two collections, one of them composed of 23 volumes and the other of 15 volumes, of the treasures of children's literature (the overall circulation of the books from the first collection was at 1.2 million copies). See <http://www.calapolskaczytadzieciom.pl/historia-fundacji> (last access: 3.01.2020).

16 The term «Lilliput publishers» was first used by Joanna Olech in her 2005 articles published in the extra to «Tygodnik Powszechny», dedicated to books. About the origin and definition of the term see K. Biernacka-Licznar, E. Jamróz-Stolarska, N. Paprocka, *Lilipucia rewolucja. Awangardowe wydawnictwa dla dzieci i młodzieży w Polsce w latach 2000-2015*, Warszawa, SBP, 2018, pp. 10-11.

17 M. Zając, *Rynek książki dla dzieci i młodzieży. Era Pottera i czas zmian*, «Poradnik Bibliotekarza» (in «Świat książki dziecięcej», an extra dedicated to books for children and young adults), n. 9, 2008, p. 2.

18 See Biernacka-Licznar *et alii*, *Lilipucia rewolucja*, cit., pp. 9-10.

19 Olech, *Wydawnictwa lilipucie*, cit., p. 21.

at home, but abroad as well, as proven by numerous honours and awards for the publishers themselves (International Excellence Award 2017, Bologna Prize for the Best Children's Publisher of the Year 2018) as well as for the books they published (Bologna Ragazzi Award)[20]. From my viewpoint, the activities of the 'Lilliputs' are relevant for two reasons. Firstly, these publishers reshaped the Polish market for children's books and significantly affected the publishing policies of such large publishers as Nasza Księgarnia. Secondly, their efforts have made it possible to publish many valuable Italian works, often for the first time in Poland, by such authors as Gianni Rodari, Roberto Piumini, or Beatrice Alemagna.

3. *The Polish publishing market vs. translations – how many and when?*

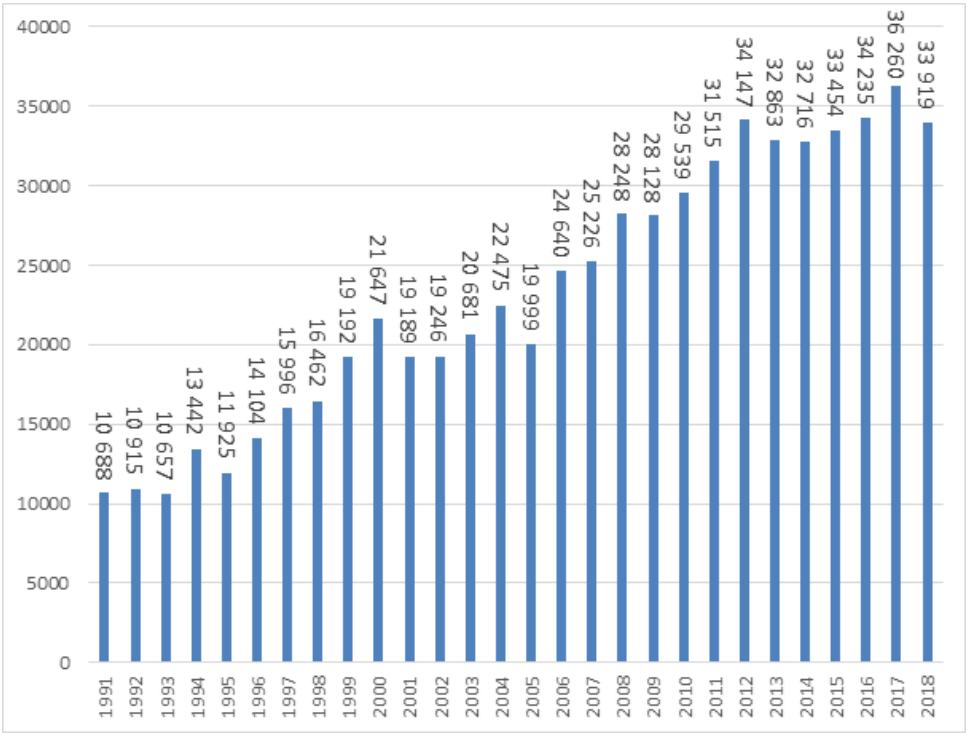
Since the political transformation, the Polish publishing market has been growing consistently; the volume of titles published at the moment almost triples the volume of 1995. Although the results published in the most recent «Polish Publishing in Figures»[21], n. 67, indicate the first slowdown in publishing production for four years – showing a 6% decrease in the number of reported books after the record-setting year 2017 – there have been a few other such minor distortions in the overall upward tendency during the last thirty years (in 2001, 2005 and 2012 – see Chart 1), and they always preceded a period of above-average growth in the number of published book titles. For the time being, it cannot be conclusively stated whether the 2018 decrease is merely a blip in the overall trend of increasing numbers of titles in publishing production, or whether it is perhaps a harbinger of a slowdown that will buck that trend. In any case, there can be no doubt that the overall status of the Polish publishing market is shown through the number of book titles translated from other languages, although the 2018 decrease in the number of fiction publications is more significant in adult titles than those dedicated to children and young adults[22].

[20] Biernacka-Licznar *et alii*, *Lilipucia rewolucja*, cit., p. 10.

[21] O. Dawidowicz-Chymkowska, *Ruch wydawniczy w liczbach 2018. Książki*, n. 67, Warszawa, Biblioteka Narodowa, 2019, p. 4.

[22] *Ibid*., p. 27.

Chart n. 1. Number of book titles published annually in Poland in 1991-2018



Data from «Polish Publishing in Figures 2018. Books».

The rates of growth in translations of children's and young adult literature from Italian to Polish are shown in Tables 1 and 2. The increasing tendency, corresponding to the overall state of the Polish publishing market during the study period, as discussed above, can be clearly seen here. Whereas there were 14 titles on the list produced by the National Library of Poland in the «Fiction for children and young adults» category in 2000, the number of translated works in 2018 had grown to 80. The data presented in «Polish Publishing in Figures» for 2000-2018 clearly demonstrates that more books are being translated from Italian for children than for young adults. Unfortunately, the National Library of Poland stopped publishing circulation and reissue data since 2013, due to difficulties with obtaining the necessary inputs. According to edition n. 59 of «Polish Publishing in Figures», the reason for this situation is the «rapid change occurring on the book market at the moment, with which the legislation on the principles of data collection by the national library cannot keep pace»[23]. At the moment, additional printing is more frequent than reissues.

[23] O. Dawidowicz-Chymkowska, *Ruch wydawniczy w liczbach 2013*, Warszawa, Biblioteka

With today's advanced printing techniques, publishers are able to follow the principle of printing only a small number of copies as the original circulation, and printing additional copies to meet market demand. This helps them avoid the costs of storing publications awaiting sale, and possibly destroying excess copies. Printing additional copies is therefore an indispensable part of the overall logic of the publishing process at the moment; it is no longer incidental, relevant only to those titles which were extraordinarily popular among buyers[24].

Since 2013, the National Library of Poland has also been applying new classification categories. Titles for children and young adults are now recognised under two subcategories: «publications for children» (dedicated to children under 13, containing not only fiction, such as picture books, traditional tales, fairy tales, simple life stories and adventure stories for toddlers, novels and adventure books for early school children, but also nonfiction, e.g. popular science books, as well as drawing books, sticker books, etc. – hence the quantitative differences in Table 1 and Table 2) and «fiction for young adults» (only literary texts dedicated to teenagers – popular science titles for this age group are included in other popular science publications). A new «comic book» category was also introduced, without specifying whether it comprises titles dedicated to adults, children, or young adults.

Tab. 1. Fiction for children and young adults translated into Polish from Italian during 2000-2018. Own elaboration based on «Polish Publishing in Figures»

Year	Fiction for children and young adults translated into Polish from Italian – total	Fiction for young adults translated into Polish from Italian			Fiction for children translated into Polish from Italian		
		Total	First editions	Re-editions	Total	First editions	Re-editions
2000	14	-	-	-	14		4
2001	31	3	2	1	28	27	1
2002	4	1	-	1	3	3	-
2003	8	-	-	-	8	7	1
2004	19	-	-	-	19	11	8
2005	25	1	1	-	24	20	4
2006	38	5	5	-	33	31	2
2007	45	5	5	-	40	37	3
2008	66	33	24	9	33	31	2
2009	60	15	14	1	45	42	3
2010	30	5	5	-	25	22	3
2011	48	14	12	2	34	29	5
2012	65	17	12	5	48	43	5

Narodowa, 2015, Vol. 59, p. 5.

[24] *Ibid.*

2013	38	11	ND	ND	27	ND	ND
2014	38	9	ND	ND	29	ND	ND
2015	57	13	ND	ND	44	ND	ND
2016	96	2	ND	ND	94	ND	ND
2017	76	3	ND	ND	73	ND	ND
2018	80	3	ND	ND	77	ND	ND

Tab. 2. Publications for children and fiction for young adults translated into Polish from Italian during 2013-2018 (according to new categories). Own elaboration based on «Polish Publishing in Figures».

Year	**Fiction** for young adults translated into Polish from Italian	**Publications** for children translated into Polish from Italian	Total
2013	11	36	47
2014	9	48	57
2015	13	52	65
2016	2	104	106
2017	3	80	83
2018	3	87	90

Therefore, in order to better demonstrate the position of Italian children's and young adult literature on the Polish publishing market, I would like to briefly present more detailed data concerning 2017, which was a record-breaking year[25] and was highly satisfactory in terms of the number of translations from Italian as well. In 2017, publications for children and young adults represented 0.08% of all published books. There were 400 titles published in the «fiction for young adults» category, of which 47% were works by Polish writers and 53% were by foreign authors. The «publications for children» category comprised as many as 2962 titles, though the proportions were different here, similar to those of the preceding years: 62% were texts originally written in Polish, while 36% were translated (the remaining 2% represent publications issued in a foreign language). A total of 352 books were translated from Italian in 2017, of which 80 titles were in the «publications for children» category and three were «fiction for young adults». By comparison, only 32 titles from the «fiction for adults» category were translated in the same year (the remaining items are scientific, popular and professional books). Fewer books were translated from Italian than in 2016, which was a record year in this category

[25] See O. Dawidowicz-Chymkowska, *Ruch wydawniczy w liczbach 2017. Książki*, Warszawa, Biblioteka Narodowa, 2018, Vol. 65, p. 5.

– Italian language publications ranked second among all the translations into Polish[26] – but this result is still very satisfactory, at least in terms of quantity. As I mentioned in the introduction, the quoted data should be perceived as estimations only, for several reasons. Firstly, the books sent to the National Library of Poland are not always accurately classified and catalogued. There are various, quite complex reasons for this. Sometimes it is difficult to define the category of a publication, particularly for popular religious books (for example, do the *Little Angels' Adventures* by Ivan Argento represent literature for children, or a religious publication?). Traditional and popular fairy tales are also problematic in terms of classification. Are we entitled to conclude that *Peter Pan* written by Valeria Manferto De Fabianis is a representative of 'Italian literature'?[27] Another source of problems is the original language for translation: publications originally written in Italian are often translated into Polish from other languages. This is done for practical reasons, but is also potentially relevant to their classification. In particular, non-fiction books, such as encyclopaedias and atlases, can sometimes be catalogued as English, American or even Polish texts. No nationality assignment is also frequently encountered. For example, Federika Magrin's *City Atlas* (Olesiejuk, 2018) and Chiara Piroddi's *Planet Earth* (Olesiejuk, 2017) can be found in quite general divisions, the former in «architecture and construction», «education and pedagogy», «culture and arts», the latter in «Earth», «animals», «ecosystems». Another major issue is how to unanimously determine the author's cultural affiliation. There are some authors who are Italian, such as Beatrice Alemagna or Davide Calì[28], but who also publish in languages other than Italian, and their works are often translated into Polish from those other languages, also generally due to practical reasons (the greater availability of English language translators and the lower cost of translation). Specifically, *A Lion in Paris* by Beatrice Alemagna is classified as French literature in the catalogue of the National Library of Poland. Another problem, and one not limited to Poland, is the issue of pen names that writers hide behind, often very successfully.

[26] Children's books are most often translated from English (54%), Italian (11%), French (10%), Swedish (4%) and Spanish (3%), in O. Dawidowicz-Chymkowska, *Ruch wydawniczy w liczbach 2016. Książki*, Warszawa, Biblioteka Narodowa, 2017, Vol. 63, p. 29.

[27] See B. Staniów, *A jednak Pinokio! O literaturze włoskiej dla dzieci w Polsce w latach 1945-2012*, in M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Przekłady w systemie małych literatur*, Toruń, Wydawnictwo Adam Marszałek, 2014, p. 253.

[28] As many as three out of four of Alemagna's books translated into Polish were translated from French: *My Friend*, (Nasza Księgarnia, 2006), *A Lion in Paris* (Tibum, 2016), *The Wonderful Fluffy Little Squishy* (Wytwórnia, 2017), and only one of them from Italian: *The Five Misfits* (Dwie Siostry, 2015). In the case of Davide Calì, born in Switzerland but considering himself an Italian author, all the books were translated from languages other than Italian, two from English: *I didn't do my homeworks because…* (Dwie Siostry, 2013), *A funny thing happened on the way to school…* (Dwie Siostry, 2015) and three from French: *A Dad Who Measures Up* (Egmont, 2007), *I Can't Wait* (Hokus-Pokus, 2013), *The Enemy* (Zakamarki, 2014).

The case of Davide Morosinotto is very interesting in this perspective: he would publish his works, among other pseudonyms, as Jeremy Belpois and David Carlyle, wrongly classified in the catalogue of the National Library as Pierdomenico Baccalario (the two gentlemen indeed work with each other and have published several titles under group pseudonyms, such as a series of *The Academy* novels as Amelia Drake), while in Italy he is sometimes recognised as an American author[29]. Finally, the data collected by the National Library is incomplete due to the publishers' fault, as they avoid the obligation to send in a mandatory copy[30]: Nadia Terranova's *Bruno The Boy Who Learned to Fly* (Format 2016), translated by Joanna Wajs, is still absent from the catalogue. Other missing titles are those from the second collection of books published by Foundation «ABCXXI – All of Poland Reads to Kids» in 2017. I mention this collection because it encompasses reissues of several important Italian texts not yet registered in the National Library's catalogue[31].

4. *The main tendencies observed during 2000-2018 – what and how?*

As already noted by Bogumiła Staniów, the period after 1990 was when over 80% of all post-war translations from Italian for children were produced, of which three-quarters were only published after 2000[32]. *Pinocchio*, Carlo Collodi's bestseller, was certainly the most frequently translated, reissued and additionally printed Italian title during the period of my study, though it had already enjoyed enormous popularity before[33]. Among the dozens of editions[34], a new translation by Jarosław Mikołajewski, a poet, writer and Italianist, certainly merits recognition, with illustrations by Robert Innocenti (Media Rodzina, 2011). Not only does it restore the Italian character of the story, but also the Tuscan aspect, which was getting lost, particularly since the release of the first film adaptation (Walt Disney, 1940). Even today, Collodi's text is very often treated like those of the traditional tales – it is reworked and abridged,

[29] See *Davide Morosinotto, alias Jeremy Belpois e David Carlyle*, <https://casadeilibri.wordpress.com/2011/07/17/morosinotto/> and *Davide Morosinotto*, <http://www.csi-multimedia.it/IT/spazio-autori/davide-morosinotto.html#axzz5p2wC6FnC> (last access: 3.01.2020).

[30] This issue was already mentioned by Staniów in: *A jednak Pinokio!*, cit., p. 242.

[31] In 2017, volume 3 included two texts by Gianni Rodari: *Gelsomino in the Country of Liars*, translated by Hanna Ożogowska, and *Stories about Alice*, translated by Jarosław Mikołajewski, and volume 6 included *Iqbal* by Francesco D'Adamo, translated by Joanna Roguska-Berdyn. Interestingly, De Amicis's *Heart*, published in volume 16 of the first 2007 collection, is present in the National Library's catalogue.

[32] Staniów, *A jednak Pinokio!*, cit., pp. 242-243.

[33] About the Polish translations and reception of *Pinocchio* in Poland until 1989, see Biernacka-Licznar, *Serce Pinokia*, cit., pp. 129-142.

[34] See Staniów, *A jednak Pinokio!*, cit., p. 244.

particularly in publications for the youngest group. A large proportion of these are coprints, not always translated from the Italian and typically without Collodi's name, far removed from the original, but still classified as 'Italian literature'[35]. Another author who has been extremely popular in Poland since the late 19th century is Edmondo De Amicis, but he has been much less fortunate in the 21st century. His book *Heart*, which found enormous success practically since the first translation (1887) and throughout the 20th century, is only reissued sporadically now, mainly by smaller publishers. These days, the second most commonly translated Italian author is Pierdomenico Baccalario, whose titles, including novels, adapted classics and non-fiction books, have been published in Poland regularly since 2005, mainly by Wydawnictwo Olesiejuk. By the end of 2018, there were 44 books authored or co-authored by Baccalario in the catalogue of the National Library of Poland. These mainly include series of novels (*Ulysses Moore*, *Century*, *Will Moogley*, *Mysteries down Voltaire Alley*), guide books (e.g. *50 Adventures to have before you turn 14*, Mamania, 2017; *50 Secret missions to survive in the adult world*, Mamania, 2018), and even an adaptation of the Bible (*The Children's Bible in 365 stories*, Drukarnia i Księgarnia Świętego Wojciecha, 2005).

In the early 21st century, the third most popular Italian writer under Communist Poland, after Collodi and De Amicis, namely Gianni Rodari[36], found a return to grace. He was promoted during the Communist period thanks to his political views, but today has been rediscovered and is appreciated anew for completely new reasons, such as his sense of humour and unrestrained imagination, messages that never grow old. Some significant credit for that goes to Jarosław Mikołajewski, mentioned above – six titles by this author were published on his initiative and in his translation. The first of these was *Pinocchio's Rhyme* published in 2002 by Wydawnictwo Muchomor[37]. A total of 13 texts by Rodari[38] were published by the end of 2018, most of them for the first time. These included: *The fables of Alice* (Muchomor 2003), *Lamberto, Lamberto, Lamberto* (Muchomor 2004), *A Pie in the Sky* (Skrzat 2005), and *The Adventures of Tonino the Invisible* (Bona 2011). It should be added here that Mikołajewski's commitment has also contributed to the publication of other

[35] There was an interesting Polish case of adaptation of the wooden puppet's adventures, i.e. *Old Geppetto's Memoirs* by Jarosław Mikołajewski (Media Rodzina 2017).

[36] See Biernacka-Licznar *et alii*, *Serce Pinokia* (exhibition catalogue), cit., pp. 11-13.

[37] *W słońcu wiecznie zielonego ucha. O Giannim Rodarim z Jarosławem Mikołajewskim rozmawia Ewa Nicewicz*, «Lente», <https://www.lente-magazyn.com/w-sloncu-wiecznie-zielonego-ucha-o-giannim-rodarim-z-jaroslawem-mikolajewskim-rozmawia-ewa-nicewicz/> (last access: 23.10.2020).

[38] For more about the Polish translations of Gianni Rodari after 2000 see E. Nicewicz-Staszowska, *«Non vorrei che tu tardassi all'incontro coi bambini polacchi». Sulla fortuna di Gianni Rodari in Polonia*, paper presented at the Conference *Altre cento di queste favole. Incontri e riflessioni sulla figura e l'opera di Gianni Rodari ad un secolo dalla nascita 1920-2020*, 14-15 January, Catania (in printing).

important and valuable Italian works during the study period in Poland, namely: *My Grandfather was a Cherry Tree* by Angela Nanetti (Nasza Księgarnia 2007), *The Bears' Famous Invasion of Sicily* by Dino Buzzati (Czuły barbarzyńca 2008), *Italian Folktales* by Italo Calvino as a joint translation (Czuły barbarzyńca 2012).

Although an extraordinarily large number of precious Italian books for children and young adults were published during the 18 years under analysis, including uncontested classics (*The Diary of Johnny Hurricane* by Vamba, *Lo stralisco* and *Mattie and Grandpa* by Robert Piumini, *Listen to My Heart*, *Polisenna and Her Pig*, and *The House in the Tree* by Bianca Pitzorno, *The Adventures of Pipi the Pink Monkey* by Carlo Collodiego, *Fables and Legends* by Leonardo Da Vinci, *The forest-root-labyrinth* by Italo Calvino, and *The Gnomes of Gnù* by Umberto Eco), there are two types of publications, not really ambitious ones, that are uncontested leaders among the translated titles. The first, very large group comprises adaptations of traditional fairy tales and literary classics, most commonly coprints, of which Wydawnictwo Olesiejuk is the main publisher. Some of these are books written by famous Italian authors (e.g. R. Piumini, *The Adventures of Pinocchio*, Olesiejuk, 2018 and P. Baccalario, *Jungle Book*, Olesiejuk, 2018), but there are many more joint publications (such as *Stories for Boys* and *Stories for Girls*, Olesiejuk, 2018), many of them anonymous (e.g. *Puss in Boots*, *Snow White*, and *The Most Beautiful Fairy Tales*, Olesiejuk 2015), or written by less known authors (e.g. R. Zilio, *My First Fairy Tales*, Olesiejuk 2018; G. Francia, *Aladdin*, Olesiejuk 2018 – an Italian work translated from English). This is the category where translation from non-original languages occurs most frequently, and not enough emphasis is placed on the quality of translation or careful editing. Another important and abundant group comprises publications dedicated to the youngest children. Their numbers multiply year after year, and they are the main items, after fairy tale collections and adaptations of the classics, that boost publishers' statistics. Here again, most publications are coprints, often consisting of twenty or thirty pages, with text usually playing a much lesser role than illustration. A significant subcategory of these publications are dedicated to specific topics (religion, animals, professions), usually presented as publishing series, somewhere between fiction and non-fiction, e.g. *Leo and his pickup truck* (Jedność 2016), *Frank and his digger* (Jedność 2017), *Peter and his dream car* (Jedność 2017) by Anastasia Zanoncelli, or *My goldfish*, *My canary bird*, *My turtle* by Bruno Tenerezza (Jedność 2014). Series of books for children and young adults are generally quite popular during the period under discussion. As noted by the curators of the *Heart of Pinocchio* exhibition, «the serialisation of children's and young adult literature, which is among the most characteristic features of this literature in early 21st century, is also represented in the novel cycles quite successfully imported from Italy»[39]. Of the most popular

[39] Biernacka-Licznar *et alii*, *Serce Pinokia* (exhibition catalogue), cit., p. 19.

series of books published in Poland during that period, we should mention the above-referenced cycles of novels by Pierdomenico Baccalario, as well as *Ballet Academy* by Beatrice Masini, *The Girl of the Sixth Moon* by Moony Witcher, the pen name of Roberta Rizzo, *Code Lyoko* by Jeremy Belpois, the pen name of Davide Morosinotto, *Sherlock, Lupin and Me* by Irene Adler, the pen name of Alessandro Gatti, and *The Last* by Silvana De Mari. There are also the international series of Italian origin – *W.I.T.C.H* and *Winx*, as well as the *Tip the mouse* series, loved by the youngest readers, illustrated by Marco Campanella and usually accompanied by original Polish text, typically written by Eliza Piotrowska or Justyna Grzymała, and *Mother Goose Teaches us* by Tony Wolf, the pen name of Antonio Lupatelli.

There is one more type of publication among Italian books for children and young adults that, although still not prevalent, is consistently present and has come to be highly appreciated. Picture books are gaining in popularity around the world, and more and more commonly published in Poland as well. Only a few such books were published during the study period, not all of them were translated from Italian, as shown from the example of Beatrice Alemagna mentioned above, or *Travel* by Francesca Sanna, translated from English (Kultura gniewu 2016). In addition, the following were printed during the study period as translations from Italian: *The story of General Tommaso, who never wanted to go to war* by Isa Tutino Vercelloni (Bona 2012), the above referenced *Bruno The Boy Who Learned to Fly* and *The Golden Cage: The True Story of The Blood Princess* by Anna Castagnoli (Dwie Siostry 2016). It should be noted that, although this comment goes beyond the temporal framework drawn here, two more important titles were published in 2019: *Petra* by Marianna Coppa (Wytwórnia) and *Black Cat, White Cat* by Silvia Borando (Nasza Księgarnia), which is a sign of increasing interest in publications of this type, currently shown mainly by the 'Lilliputs' – these are certainly very valuable books, both from a literary viewpoint and from a graphic perspective.

Although the vast majority of Italian works for children and young adults that are translated in Poland today could not be called ambitious (the leaders in such publications are Wydawnictwo Olesiejuk and Wydawnictwo Jedność), the good standing of the Polish book market and the presence of the 'Lilliput' publishers give us some hope that the trend of importing valuable children's and young adult books to Poland can be maintained. A lot of Italian titles categorised by IBBY as Highly Commended for translation into other languages[40] are still missing, but the publishers more keen than ever to observe the situation on the Italian publishing market – they visit the Bologna book fair and follow the literary award ranks, as indicated by the extremely rapidly produced translations of books by such contemporary Italian authors as Davide Morosinotto or Fabrizio Silei. However, all the publishers I interviewed admitted that they

[40] Staniów, *A jednak Pinokio!*, cit., p. 264.

would publish more titles translated from Italian if there was a solid Italian financial aid system targeted at translations, like the one France provides to its literature (support is not only offered to publishers, but also to translators)[41] or the scheme from Germany (subsidies to cover the costs of purchasing the licence and translating a book from the German-speaking area)[42]. Today, a publisher that wants to publish an Italian title can theoretically apply for a grant to the Italian Cultural Institute[43], but the funding is only available for translation work (which, in business practice, is the least expensive item in the cost of publishing a title), and the principles applied in assigning grants are not completely transparent. The whole procedure seems to be extremely complex and time consuming, and experience shows that there are very few publishers lucky enough to obtain the actual funding. Most of them withdraw from applying for a grant already at the point of reading the relatively vague information published on the institution's website.

5. Trends and development directions during 2000-2018, based on the example of Nasza Księgarnia

Nasza Księgarnia is the oldest publishing house for children and young adults that has been operating without interruption since it opened in 1921. It first started as a company with a vocational teacher organisation as the primary shareholder[44]. The primary goal of the publisher was to supply textbooks and learning aids to primary schools. Publishing children's books was initially treated as a marginal activity, but that changed already in the 1930s. According to the official documentation, a total of 454 titles were published during the entire pre-war period, some of them in more than one edition[45]. Nasza Księgarnia, as noted by Jan Okopień, «played a significant role in the Polish publishing movement during the interwar period»[46], and was not interrupted in its operations during the German occupation, publishing books and schoolbooks underground, using false dates. After the war, the publishing house was transformed into a cooperative and resumed its activities under the name Instytut Wydawniczy Nasza Księgarnia. Later, in January 1954, the publishing house became a State-

41 See <https://www.institutfrancais.pl/pl/dziedziny> (last access: 3.01.2020).

42 See <http://www.kroki.pl/projekt-pl.html> and <https://www.goethe.de/ins/pl/pl/kul/ser/uef.html> (last access: 3.01.2020).

43 See <https://iicvarsavia.esteri.it/iic_varsavia/pl/opportunita/premi_e_concorsi/premi_e_contributi_alla_traduzione> (last access: 3.01.2020).

44 J. Okopień, *Nasza Księgarnia*, «Wydawca», n. 10, 1995, p. 22.

45 M. Rogoż, *Czasopisma dla dzieci i młodzieży Instytutu Wydawniczego «Nasza Księgarnia» w latach 1945-1989*, Kraków, Wydawnictwo Naukowe UP, 2009, p. 14.

46 Okopień, *Nasza Księgarnia*, cit., p. 23.

owned enterprise (first under the name Państwowe Wydawnictwo Literatury Dziecięcej Nasza Księgarnia, before returning to the former name Instytut Wydawniczy Nasza Księgarnia in February 1960[47]) and was strongly promoted by the authorities, who sought to have total control over the entire publishing system[48]. It quickly became not only the largest publisher of books and periodicals for children and young adults, but also an institution that played a decisive role in shaping the scope of publishing and the Polish editorial model of children's books[49], acting as sponsor and organiser in relevant projects[50]. Between 1945 and 1992, i.e. until its privatisation, it published over 10,000 titles and the total circulation was over 500 million copies[51]. Importantly, as noted by the authors of *The Lilliputian Revolution*, «the dominant position of Nasza Księgarnia and the established forms of editorial cooperation with authors and illustrators guaranteed the freedom of creative work, without commercial restraints or submission to stereotypes, tastes or preferences»[52].

After 1989, in the new reality of the free market, the formerly State-owned publishing house, having enjoyed decades of unchallenged domination, had to face strong competitors, i.e. new publishers, not only Polish but also international[53]. It therefore had to carefully observe the prevailing trends and developments of the industry, while ultimately bidding farewell to its leading position on the market of publications for children and young adults, which it had maintained until the early 1990s[54]. Like other publishing giants who were forced to adapt to the current trends and customs, Nasza Księgarnia also experienced a «decade of quality decay» after 1989[55], becoming «a symbol of the stagnation and inertia of the 1990s»[56]. As noted by Michał Zając, this publisher, with its recognised service for children's books in Poland, would «only cash the profits from copyrights and publish profitable classics» throughout the final decade of the 20th century[57]. It only returned to its former standards when the 'Lilliput' publishers first appeared on the Polish market and started to introduce more and more interesting and ambitious titles.

What was the panorama of translations from Italian through all these years, particularly including the period of interest here? In the years 1945-1989, editors, translators and researchers working on books for children and young

47 See <https://nk.com.pl/page,o_nas_historia/index.html> (last access: 3.01.2020).
48 Biernacka-Licznar *et alii*, *Lilipucia rewolucja*, cit., p. 18.
49 See Biernacka-Licznar, *Serce Pinokia*, cit., p. 47.
50 See Rogoż, *Czasopisma dla dzieci i młodzieży Instytutu Wydawniczego «Nasza Księgarnia» w latach 1945-1989*, cit., pp. 24-25.
51 Okopień, *Nasza Księgarnia*, cit., p. 23.
52 Biernacka-Licznar *et alii*, *Lilipucia rewolucja*, cit., p. 18.
53 *Ibid*., p. 19.
54 See Biernacka-Licznar, *Serce Pinokia*, cit., p. 49.
55 Olech, *Ilustracja polska po potopie*, cit., p. 194.
56 Zając, *Rynek wydawniczy w dziedzinie książki dla dzieci – dobra zmiana*, cit., p. 33.
57 *Ibid*.

adults contributed greatly to «importing new titles to Poland and promoting them»[58]. This was also true for Nasza Księgarnia, which stood out among other publishers also in terms of the number of translations from Italian. During that period, the publisher successfully reissued *Heart* by De Amicis and *Pinocchio* by Collodi multiple times, along with a collection of poems and several works of prose by Gianni Rodari. The range of translations also comprised texts by such authors as: Marcello Argilli, Baccio Maria Bacci, Teresa Buongiorno, Italo Calvino, Bianca Pitzorno, Luciana Martini, Renée Reggiani, Paolo Statuti and Guglielmo Zucconi. After the fall of Communism, the publisher had to adapt to the merciless competition and to keep up with the readers' expectations, even though these were not very sophisticated, as mentioned above. Though it may seem impossible, there were no translations from Italian that could be identified as ambitious literature published during the 'flood', other than reissues and new translations of *Pinocchio*[59]. Fortunately, the publishing market soon underwent a change initiated by the 'Lilliput' publishers. Today, you can read the following on Nasza Księgarnia's official website:

> It is the Publisher's ambition to deliver beautiful and valuable books to young readers, with the distinctive features of highest quality. In these difficult times of transformation, the continuously shifting book market, new technologies and production organisation, we are trying to develop such methods and criteria for working on books that will make it a successful competitor to any kind of mass audiovisual media[60].

Interestingly, the publisher sets out that translated books play an important role in their publishing plans. They cooperate with international publishers across Europe, in the United States and Canada. They carefully follow new publications abroad and try to present the most interesting literary events worldwide to Polish readers[61]. According to an interview[62] with Joanna Wajs, poet, translator of Italian and English language literature for adults and children, and editor-in-chief at Nasza Księgarnia since 2008, during the period of interest, i.e. during 2000-2018, books translated from foreign languages represented approx. 30% of all the published books, and translations from Italian made up approximately 2% of the entire publishing output. A total of 21 titles were published, though two of them were from Italian translations of books originally written in another language[63], and one more was the aforementioned work

58 Biernacka-Licznar, *Serce Pinokia*, cit., p. 90.

59 See Woźniak *et alii*, *Bibliografia edycji dla dzieci tłumaczonych z języka włoskiego na język polski wydanych w latach 1945-2012*, cit.

60 <https://nk.com.pl/page,o_nas_historia/index.html> (last access: 3.01.2020).

61 It should be noted that this publisher holds exclusive rights to publish such bestsellers in the Polish language as Astrid Lindgren's books, Tove Jansson's Moomin series, *Winnie The Pooh* and *The House at Pooh Corner* by A.A. Milne, or the Little Nicholas cycle by J.J Sempé and R. Goscinny. See <https://nk.com.pl/page,o_nas_historia/index.html> (last access: 3.01.2020).

62 Based on an interview conducted with Joanna Wajs on November 2019 in Warsaw.

63 Translated from Italian were the books by Georg Maag, *The garden* [Il giardino], translated

by Beatrice Alemagna, translated from French[64]. Thus, as with the previously discussed examples, here we also encounter a problem with making an unambiguous classification, while the quoted data should be seen as estimations. Based on the information received from the publisher, *Pinocchio* by Collodi, translated by Agnieszka Rylukowska (formerly Piotrowska) continued to be a record breaker in terms of reissues – it was reissued seven times. Interestingly, there has been not a single reissue of *Heart* by De Amicis in the 21st century, despite it being extremely popular with Nasza Księgarnia up to 1989[65]. Instead, there was a highly popular novel by Angela Nanetti: *My Grandfather Was a Cherry Tree* (*Mio nonno era un ciliegio*, 1998), published in 2007, translated by Jarosław Mikołajewski, and reissued in 2018. During the first decade of the 21st century, Nasza Księgarnia would mainly focus on its popular series of books. During these years, the publications included the 10-volume series *Ballet Academy* (*Scarpette rosa*) by Beatrice Masini, translated by Beata Rybarczyk, Hanna Cieśla and Katarzyna Skórska, and in 2005 there were three volumes of adventure books about a girl fascinated by fortune telling and magic, by Paola Zannoner: *Mia and the Amulet of Rha* (*Mia e l'amuleto di Rha*, 2003), *Mia and the little dinosaur* (*Mia e il piccolo dinosauro*, 2003) *Mia and the Argentinian Tango* (*Mia e il tango argentino*, 2003) translated by Małgorzata Mastrangelo. During the second decade, in addition to the aforementioned *Pinocchio*[66], more sophisticated books appear, carefully chosen in terms of text and illustrations, written by authors not previously translated in Poland. In fact, 2018 turned out to be a record year for translations from Italian. In addition to the Nanetti reissue mentioned above, in that year Nasza Księgarnia published *I am Zero* (*Io sono zero*, 2015) by Luigi Ballerini, translated by Tomasz Kwiecień, and two extraordinary translations by Joanna Wajs: *The Zooablator. The Invention that changed the World* (*Lo zoablatore. L'invenzione che cambiò la storia*, 2016) by Sergio Olivotti, and a novel entitled *The All Mine Academy* (*L'Università di Tuttomio*, 2017) by Fabrizio Silei, nominated for Premio Strega Ragazze e Ragazzi 2018 in Italy.

Ambitious books, perfectly translated, edited and graphically designed, are the result of the publisher's intentionally followed policy, particularly noticeable recently. Joanna Wajs admits that Nasza Księgarnia is trying «to search for books that are perfect from a literary viewpoint (in the case of literature for children who can read by themselves) and for innovative titles in surprising forms (in the case of books for the youngest children»[67]. The Bologna Book

by J. Mikołajewski (2005), and by Delphine Chedru, The *Courage Knight* [Il cavaliere Coraggio], translated by J. Wajs (2017).

64 Alemagna Beatrice, *My Friend* [Mon Amour], translated by N. Gowin (2006).

65 See Biernacka-Licznar, *Serce Pinokia*, cit., p. 117.

66 During an interview, Joanna Wajs said that Nasza Księgarnia often reissues and has additional print runs of the classics.

67 *Ibid*.

Fair plays an important role in keeping track of new books and selecting titles for translation, and the publisher attends the event every year. The lead editors, who are the main people who initiate the decision-making process on whether to publish a specific book, also intently follow the Italian literary awards such, as Premio Andersen or Premio Strega Ragazze e Ragazzi. Wajs adds: «It certainly helps that some of our editors can read Italian and evaluate the Italian-language publishing offers by themselves»[68]. Interesting titles are then recommended and presented by the lead auditor, while the final decision is taken by the chairman of the publishing house, together with the publishing department, the sales department and the promotion department at a publishing meeting. In this way, Nasza Księgarnia seems to be combining the new realities it faces with the best practices put in place during the publisher's golden years, i.e. those of 1989 when titles were selected by editors and translators working with the publisher[69]. If the publishing house is able to maintain this tendency in the new commercialised reality it finds itself in, thirty years after the transformation, then Nasza Księgarnia can again become an important ambassador of valuable Italian literature for children and young adults in Poland.

Conclusion

The Polish market of books for children and young adults seems to be extremely diversified today. On the one hand, a major part of this market is occupied by publishers (Olesiejuk, Jedność) who treat books as commodities generating quick profits – books for non-adult readers continue to sell well, notwithstanding the extensive and competitive range of audiovisual productions. As a result, the reader receives mediocre, average publications, often with factual, linguistic and illustration errors or, in the case of Italian publications, frequently translated from other languages, such as English. On the other hand, there are still some small, ambitious publishers with the ultimate goal of introducing beautiful and valuable books for the younger generations onto the domestic market. These 'Lilliput' publishers keep on winning industry awards in Poland and abroad, and although fame does not always bring sales success, their impact on the publishing market continues to increase year by year, as they become «a source of inspiration for their rivals – the large publishers»[70]. The marginal area of ambitious books, including those of Italian origin, trying to make their way through to mass production, has recently become broader. Michał Zając gives

[68] *Ibid*.

[69] See Biernacka-Licznar, *Serce Pinokia*, cit., p. 90 and p. 96.

[70] J. Olech, *Liliputy rosną*, «Tygodnik Powszechny» (in «Książki w Tygodniku», an extra dedicated to books), n. 17, 25 April 2010, p. 20.

a very accurate summary of the current situation in Poland: «Last year [from May 2017 to May 2018], the market of books for children and young adults was not full of surprising events, bestsellers that had an electrifying effect on the book industry or readers, and nor did any new stars arise. However, it was absolutely not an altogether boring or dull year […]»[71]. The positive trends seem to have stabilised. Changes are taking place consistently and, importantly, they are affecting parents as well, who are more and more willing to perceive books as the perfect developmental tool for children's skills and sensitivity, and therefore they are demanding more valuable publications[72]. All this gives good grounds for hope that there will be more opportunities for sophisticated Italian literature for children and young adults in the decade just beginning.

[71] M. Zając, *Historia i «herstoria». Od maja do maja, czyli rok w książce dla dzieci młodzieży*, «Magazyn Literacki Książki» (in «Książki dla dzieci i młodzieży» an extra dedicated to books for children and young adults), n. 5, 2018, p. 1.

[72] *Plebiscyt Lokomotywa* [The Locomotive Poll], which had its first edition in January 2019, is a perfect example of such projects. It is managed by a group of bloggers (mainly parents writing about valuable publications for children), giving awards in six categories: «Fiction», «Non-fiction», «Visual», «Comic», «Translation», and «From A to Z». See <https://www.plebiscytlokomotywa.pl/kopia-start> (last access: 3.01.2020).

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Bianca Pitzorno in Polish translations

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ABSTRACT: Only four children's novels out of Bianca Pitzorno's entire literary production have been published in Polish. In this paper, all these Polish versions are compared with their originals. The analysis focuses on the translation of culture-specific items such as proper names. The aim is to determine what procedures were applied by the translators and whether there are significant differences between the first translation, published in 1981 (*Clorofilla dal cielo blu*), and the other ones, published a quarter of a century later. The analysis shows that the omission strategy was hardly employed at all, and the translator's footnotes were only used in one Polish edition. The translators of *Ascolta il mio cuore* (2005) and *La casa sull'albero* (2007) were least consistent in their choice of techniques, while the translator of *Clorofilla dal cielo blu* borrowed most of the anthroponyms from the original.

EET/TEE KEYWORDS: Bianca Pitzorno; Italian literature in Poland; Literary translation; Anthroponyms; Children's literature; XXth-XXIst Centuries.

Introduction

Bianca Pitzorno, an author of short stories, novels, essays, song lyrics, film scripts and TV shows, a translator and a UNICEF ambassador, was born in Sassari, Sardinia, in 1942. She studied first in Cagliari and then in Milan, where she has been settled for several years now. Her writing is characterised by the crossing of boundaries of styles and generic conventions, a considerable ethical investment and a very strong female presence among the young characters. Emy Beseghi has called Pitzorno «the greatest contemporary Italian writer for children», showering her with praise as «the one most translated abroad», an «undisputed master of plots» and a «keen observer of childhood»[1]. Polish

[1] E. Beseghi, *Introduzione*, in M. Casella, *Le voci segrete. Itinerari al femminile nell'opera di Bianca Pitzorno*, Milan, Mondadori, 2006, pp. 9-10. «[la] più grande scrittrice italiana contemporanea per l'infanzia, quella maggiormente tradotta all'estero», «indiscussa maestra dell'intreccio», «acuta osservatrice dell'infanzia».

children's literature scholars count Pitzorno among «popular and interesting contemporary Italian female writers»[2]. In one of the cover endorsements of the Polish translation of her *La casa sull'albero*, Pitzorno was dubbed «a star of children's literature» and «the author of about forty crazy and charming novels for children and young adults»[3].

Polish studies committed to familiarising the Polish reading public with Pitzorno's writing offer basic information about her life and work[4], explore the world she portrays in her children's novels (characters, settings, key motifs, etc.) against their cultural backdrop, their axiological themes, literary models and inspirations[5], and outline the reception of her works in Poland[6]. However, the Polish translations of Pitzorno's texts still remain an unexamined territory. The aim of this paper is to remedy this gap.

None of Pitzorno's books for an adult readership has been published in Poland yet. There are nevertheless Polish translations of four of her children's books: *Clorofilla dal cielo blu*, 1975 [Chlorophyll from the Blue Sky] (*Chlorofilka z błękitnego nieba*, 1981), *Ascolta il mio cuore*, 1991 [Listen to My Heart] (*Posłuchaj mojego serca*, 2005), *Polissena del Porcello*, 1993 [Polisenna and Her Pig] (*Poliksena i prosiaczek*, 2006), *La casa sull'albero*, 1985 [*The House in the Tree*] (*Magiczny domek*, 2007). The four books were released by three different publishers, and each of the translations was penned by a different translator (or a pair of translators). There was a lapse of twenty-five years between the publication of the first translation and the release of the following three. Although Pitzorno still writes and enjoys popularity in her native Italy[7], no new translation of her books has been printed in Poland since 2007. This suggests that Polish publishers' interest in Pitzorno is rather erratic and random.

[2] K. Biernacka-Licznar, *Serce Pinokia*, Warszawa, Stowarzyszenie Bibliotekarzy Polskich, 2018, p. 220; Z. Ożóg-Winiarska, *Bianca Pitzorno i jej bohaterowie*, in K. Heska-Kwaśniewicz (ed.), *Młody odbiorca w kręgu lektur pożytecznych i szkodliwych*, Katowice, Wydawnictwo Uniwersytetu Śląskiego, 2012, p. 93; Z. Ożóg-Winiarska, *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*, Kielce, Instytut Filologii Polskiej UJK w Kielcach, 2017, p. 91. Ożóg-Winiarska's *Bianca Pitzorno i jej bohaterowie* was reprinted in *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*.

[3] B. Pitzorno, *Magiczny domek*, Warszawa, Prószyński i S-ka, 2007.

[4] Biernacka-Licznar, *Serce Pinokia*, cit., pp. 220-223; Ożóg-Winiarska, *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*, cit., pp. 91-94.

[5] Ożóg-Winiarska, *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*, cit., pp. 94-121.

[6] Biernacka-Licznar, *Serce Pinokia*, cit., pp. 223-225.

[7] In 2015, Mondadori published Pitozrno's book for adults *La vita sessuale dei nostri antenati (spiegata a mia cugina Lauretta che vuol credersi nata per partenogenesi)*, which was awarded the Premio Napoli per la cultura e la lingua italiana in the same year and the Premio Salvatore Cambosu in 2016. Pitzorno's latest novel (for adults, too) to date is *Il sogno della macchina da cucire* (Bompiani 2018).

As for the reception of Pitzorno's work in other areas, «Guliwer», a journal on children's books founded in 1991, has published two reviews of her novels released in Poland. These reviews do not offer any assessment of the translators' work as such, treating translations as identical with the originals. In one of these reviews, Karolina Jędrych appraises *Posłuchaj mojego serca* as a «deeply warm-hearted» autobiographical novel, whose narrative may startle contemporary readers with drastic images of the rich-poor divide, frequently administered corporal punishments and a lack of parental support for schoolgirls who acutely feel their teacher's injustice[8]. In the other review, Izabela Mikrut[9] cites examples of the role of fantasy in the story about a house in the tree (*La casa sull'albero*) and highlights another trademark feature of Pitzorno's writing, i.e. the preparation of children for their future adult lives without any obtrusive moralising. Pitzorno's *Polissena del Porcello* has been reviewed in «Nowe Książki» (a literary and scholarly critical journal in circulation since 1949). To my knowledge, «Ryms», a journal (since 2007) and vortal (since 2009) devoted to children's and young adults' literature, has neither reviewed Pitzorno's books nor even mentioned her writings as such[10].

Within my project, I studied all the published Polish translations of Pitzorno's works, including a range of peritexts (dedications, footnotes, introductions and afterwords). My comparative analysis of the translations and the originals focuses on anthroponyms, particularly on the characters' proper names. My selection of this theme is driven by the fact that anthroponyms are ascribed a highly relevant role in Pitzorno's texts, and the writer herself insists that in choosing them she carefully matches them with her protagonists' personalities and takes into account their auditory quality[11]. As argued by Christiane Nord, who identifies a group of «descriptive names» among proper names and observes that anthroponyms can function as «culture markers», «there is no name in fiction without some kind of auctorial intention behind it, although, of course, this intention may be more obvious to the readers in one case than in another»[12].

My project aimed to establish what translation techniques were used in these translations and whether those applied in the earliest of them (1982) essentially differed from the later ones (2005-2007). Drawing mainly on Nord's paper on translations of *Alice in Wonderland* into various languages[13] and availing

[8] K. Jędrych, *Powrót do dzieciństwa*, «Guliwer», vol. LXXVII, 2006, pp. 97-98.
[9] I. Mikrut, *Niezwyczajna codzienność*, «Guliwer», vol. LXXX, 2007, pp. 85-86.
[10] <http://www.ryms.pl/> (last access: 3.01.2020).
[11] B. Pitzorno, *Storia delle mie storie*, Milan, Pratiche, 2002, pp. 193-194.
[12] C. Nord, *Proper Names in Translations for Children*, Alice in Wonderland *as a Case in Point*, «Meta», vol. 48, n.1-2, 2003, pp. 183.
[13] *Ibid*.

myself of the list of techniques compiled by Laura Cantora[14], I will rely on the following classification of techniques:

reproduction or *borrowing* (a proper name is transferred to the target text in its original form without any spelling changes);
adaptation of source-cultural names to target-language morphology or phonology (*transcription*);
substitution of source-culture names by target-culture names (therein *fixed translation*, i.e. the use of *exonyms*);
proper names rendered as generic nouns;
neutralization (a culture-specific name is rendered by a culture-unspecific or 'transcultural' reference);
calque (*literal translation*);
omission;
intratextual gloss;
extratextual gloss (*annotation*).

In my framework, anthroponyms provide a key to Pitzorno's writing. Given this, my anthroponym-focused comparative reading also attends to a rage of aspects related to them (e.g. toponyms) and departures from the original. This approach promotes a broader perspective on the translators' strategies and additionally helps assess the quality of the translations.

1. *Analysis*

Clorofilla dal cielo blu

Clorofilla dal cielo blu[15], Pitzorno's second novel, was the writer's first text translated into Polish. *Clorofilla* was first published by Bietti (Milan, 1975), subsequently, already after the release of the Polish translation, by La Sorgente (Milan, 1982) as *E un giorno dal cielo arrivò Clorofilla*, and finally by Mondadori, starting in 1991. Its Polish version was authored by Krystyna and Eugeniusz Kabatc, distinguished translators of Italian literature (Eugeniusz Kabatc is also a gifted novelist), who had earlier translated *A ciascuno il suo*, 1966 [To Each His Own] by Leonardo Sciascia (*Każdemu, co mu się należy (od mafii)*, 1979) and *Una questione private*, 1963 [A Private Affair] by Beppe Fenoglio (*Pewna prywatna sprawa*, 1979), and followed their translation of *Clorofilla* with many

[14] L. Cantora, *What can Proper Names tell us about Corpus Based Translation Studies*, in A. Bączkowska (ed.), *Perspectives on translation*, Newcastle upon Tyne, Cambridge Scholars Publishing, 2015, pp. 13-15.

[15] B. Pitzorno, *Clorofilla dal cielo blu*, Milan, Bietti, 1975; Polish transl. *Chlorofilka z błękitnego nieba*, Warszawa, Nasza Księgarnia, 1981.

other ones, including *Pinocchio* (1994). The Kabatcs studied Italian language and culture during their stint in Rome in 1968-1972, when Eugeniusz served as a Cultural Counsellor at the Polish embassy. They were avidly engaged in the cultural life of Italy, exhibiting a considerable interest in the Italian publishing market and personally meeting Italian writers for children and young adults, therein Bianca Pitzorno, who pointed out attention-deserving publications to them[16].

Similarly to the original, the translation of *Clorofilla* is both full of fantasy and environmentally committed (and in this sense pioneering, I believe, on the Polish publishing market). The Polish edition (1981), though more modest than the Italian one in terms of the format, the cover and the paper, contains illustrations by Gianna Santini Valeriani, reprinted from the first edition of the original. Besides the illustrations, the translated edition also preserves the initial features of Pitzorno's text. This is significant especially since the comparison of the source and target texts has shown that the version of the book currently available to Italian readers slightly differs from that of 1975.

The book tells the story of siblings (10-year-old Michele and his 4-year-old sister, Francesca) who are sent by their parents from Genova to Milan by train. Having arrived at their destination, the children land in the home of a famous professor of botany, whom they mistake for their uncle, a misunderstanding that the absent-minded professor fails to set right. At the professor's home, the children meet a visitor from outer space: a plant-girl named Clorofilla, whom her extra-terrestrial father has entrusted to the professor in hope of saving her life jeopardised on the Earth as the composition of the atmosphere differs from that on her home planet. The professor invents a substance called *Verdeplasma*, which not only strengthens Clorofilla but also, as a result of a series of coincidences, rapidly turns Milan from a polluted, concrete desert into a garden of Eden, replete with lush vegetation and an abundant fauna. The quality of life in the city skyrockets, especially since the thriving of plant – and wildlife compels the return to nature, which fosters the rise of humanitarian values.

Because of its setting, the story evokes the topography of Milan (the dome, Piazza della Scala with its famous theatre, the church of St. Lorenzo and Piazza Vetra), other Italian locations (the city of Pavia, the Ticino River, the Aeolian Islands) and remote countries (Hongkong, Chile). The translators used the official Polish equivalents of the toponyms (exonyms) wherever possible. Nevertheless, they left the Italian street names, which add an exotic flavour, even though Pioppi (Poplars), Fenicotteri (Flamingos) and Colombaia (Dove Cotes) do not reference Milan's actual topography but tie in with the environmental theme of the text.

[16] Biernacka-Licznar, *Serce Pinokia*, cit., pp. 95-96, 224.

The Polish translation is slightly abbreviated. Among the removed passages, there is Francesca's reflection which conveys her world- and self-perception, a signature feature of Pitzorno's writings, in which the story is often narrated from a child's point of view. Besides, the translation is not free from mistakes. As far as the novel's axial ecological theme is concerned, *anidride carbonica* is strikingly rendered as *bezwodny siarczan węgla* [anhydrous carbon sulphate] instead of *dwutlenek węgla* [carbon dioxide], and *inquinamento*, *inquinato* as *zatrucie*, *zatruty* [poisoning, poisoned] instead of *zanieczyszczenie*, *zanieczyszczony* [pollution, polluted].

In the meantime, Pitzorno herself made some significant changes to the original Italian text of 1975. The 2001 edition of *Clorofilla* includes an introductory peritext, which encourages reading the novel as deliberately aiming at a universal appeal:

> Quella che state per leggere è una storia fantaecologica avvenuta in un prossimo futuro in una metropoli che per comodità è stata chiamata Milano. Ma tutto il mondo è paese, perciò potrebbe trattarsi anche di Parigi, di Londra, di New York o Brasilia. Dopotutto i suoi personaggi sono inventati. Quindi non se la devono prendere il sindaco, le autorità, i giornalisti, le contesse e le forze dell'ordine e della cultura milanesi se pensano che in una circostanza del genere *loro* si sarebbero comportanti in modo diverso. Alla fine scoprirete che vicende come quella di Clorofilla dovrebbero capitare più spesso, e dapertutto, con i tempi che corrono[17].

At the same time, the new Italian edition of the book no longer contains Michele's sarcastic commentary at the sight of Clorofilla parading in front of a mirror, a remark which is to be found in the Polish translation: «Może nie wiemy, do jakiej rasy należy, ale że to jest babska rasa, nie ma wątpliwości!» [«We may not know what race she is, but it is a girly race, no doubt about it!»][18]. This elimination was in all probability prompted by the increasing feminist sensibility. The revised Italian text is made more vibrant by re-naming the persistent investigative reporter from Simone Lucianelli to Venazio Costantini. The new first name (Venazio) is rarer, and the surname (Costantini) refers to the character's extraordinary perseverance [Italian: costanza]. It is more of a riddle why the name of the foreign author of a paediatric treatise was changed as well – from Spook to Spock. Perhaps the modification was meant to re-channel its associations from the English meanings of the word *spook* to the

[17] B. Pitzorno, *Clorofilla dal cielo blu*, Milan, Mondadori, "Junior Mondadori", 2001, p. 3. [What you are about to read is an ecological fantasy story that takes place in the near future, in a metropolis which has been called Milan for convenience. But the entire world is one country, so it could also be Paris, London, New York or Brasilia. After all, its characters are invented. So the Milanese mayor, authorities, journalists, countesses, law enforcement and cultural institutions need not take it so hard if they believe that in such circumstances *they* would have behaved differently. In the end, you will realise that events such as those in *Clorofilla* should occur more often and everywhere in our times].

[18] B. Pitzorno, *Chlorofilka z błękitnego nieba*, Warszawa, Nasza Księgarnia, 1981, p. 72.

popular character of the *Star Trek* series; or perhaps it was just a misprint. The epilogue of the novel underwent the most incisive changes. Specifically, the new one no longer includes Michele's letter to Clorofilla (who has returned to her planet) and the seven names of children adopted (in the 1975 version) by Erasmus and Ms. Cesire, a janitress whom he marries.

The first version of the Italian text includes forty anthroponyms (first names and surnames in total), three of which refer to historical figures (St. Lawrence and the poet Giovanni Pascoli). Most proper names are markers of Italian culture, with the major exception of a foreign authority on paediatrics (Spook), who is juxtaposed with a domestic expert (Marcello Bernardi). The Polish translation specifically states that Spook is an English paediatrician. A considerable majority of the anthroponyms (32) were transferred to the translation in an unchanged form, which contributed to the exoticisation of the text. Thereby, some connotations were irretrievably lost. Polish readers are not likely to realise that *Rossi* (a very popular Italian name and the surname of some characters in *Clorofilla*) is the Italian equivalent of English *Smith* or Polish *Kowalski*. Presumably, as the writer's express intention was to make Milan represent all cities, it was also her idea to suggest that the described events could happen to anyone. An average Polish reader is similarly likely to miss the contrast between the rather facetious-sounding first name Peppino (a diminutive of Giuseppe) and the 'learned' surname (Erasmus) of the botany professor, which expresses the character of this figure.

The Polish translators also used a few other procedures. In one case, the modification of the name is attributable to a misprint: Marrangoni – Mazzangoni. In compliance with the common usage, the name of a saint (Lorenzo) was replaced with an exonym (Wawrzyniec). One name was adapted to the morphology of the target language: Zenaide – Zenaida[19]. Resorting to a calque, the translators rendered the descriptive name of the eponymous protagonist Clorofilla as Chlorofilka[20]. Unlike in descriptive toponyms, they supplanted five other character names (capitalised plant names) with their Polish dictionary counterparts, with one of them being identical with the original [Italian: palma; English: palm tree]. In the original, one name is ascribed to two characters on two occasions. In the translation, their equivalents are differentiated: on one occasion, the original form is reproduced, and on the other a modification is involved: turning the masculine form into the feminine one (Peppino – Peppina) or using a diminutive (Margherita – Margheritka). As an effect, the number of anthroponyms rose to 42 in the translation.

[19] In Polish, feminine nouns (and especially women's proper names) as a rule end with an -a.

[20] The Polish word for chlorophyll is *chlorofil*, and this masculine noun is turned into a feminine diminutive by the -ka suffix in conformity with the principles of derivation in the Polish language.

Ascolta Il Mio Cuore

Based on Pitzorno's personal memories and acclaimed as one of the most important young adults' novels of the 20th century[21], *Ascolta il mio cuore* was the writer's second book translated into Polish[22]. Certain aspects of this bestseller are redolent of Edmondo De Amicis's celebrated *Heart* (*Cuore*, 1886). The two novels are remarkably similar in that their action is set across one school year, the names of months serve as titles of book parts (from October to July in Amicis, and from September to June in Pitzorno), the protagonists are primary-school students, and the overall structure of the two novels includes smaller narrative forms («The Monthly Stories» in Amicis, and a nine-year-old's composition, letters and poems in Pitzorno)[23]. However, Amicis wrote his book about boys and for boys, while Pitzorno's book has a girl as its main character and is rather intended for girls. At the same time, the imaginative and passionate fourth-grader at the centre of *Ascolta il mio cuore* strikingly differs from a passive and average Enrico, a third-grade student whose diary is the basis of *Cuore*. The symbolic meanings of the heart, which appears in the titles of both works, also differ. In the novel published shortly after the unification of Italy, it embodies patriotic sentiments, love for one's parents, respect for teachers and elders and compassion for the unfortunate and the disadvantaged. In the novel whose action is set a few years after the Second World War, the heart stands for individual feelings of an emotional and empathetic nine-year-old, a girl sensitive to injustice.

Małgorzata Mastrangelo, who translated *Ascolta* into Polish in 2005, published six other translations from Italian in the same year as a collaborator of two publishers specialising in children's and young adults' literature: Cracow-based Skrzat and Warsaw-based Nasza Księgarnia. Her efforts greatly expanded the Polish reception of Gianni Rodari (*La gondola fantasma*, *Novelle fatte a macchina*, *La torta in cielo*) and ushered Paola Zannoner onto bookshelves of Polish readers (*Mia e l'amuleto di Rha*, *Mia e il tango argentino*, *Mia e il piccolo dinosauro*). Mastrangelo had earlier translated (2004) Vamba's famous novel *Il giornalino di Gian Burrasca* (1911) and followed the feat of 2006 with a translation of *Pinocchio* (2007) (hers and Kabatcs' translations are among about fifteen Polish versions of this Italian evergreen).

Pitzorno added a four-page introduction to her novel with the intention of explaining to her young readership what life was like in post-war Italy in terms of social relationships, material aspects of everyday life at home and at school, the education system and the grading scale. The fourteen-year time-lapse

21 Biernacka-Licznar, *Serce Pinokia*, cit., p. 222.

22 B. Pitzorno, *Ascolta il mio cuore*, Milan, Mondadori, 1991; Polish transl. *Posłuchaj mojego serca*, Kraków, Wydawnictwo Skrzat, 2005.

23 These analogies have also been noted by Ożóg-Winiarska, *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*, cit., p. 101.

between the publication of the original and the translation made the culture in which the work is embedded all the more remote to readers. For this reason, the translation of the peritext has an even more important role than in the Italian edition, because the cultural distance is greater. Regrettably, the Polish version is marred with a number of errors. For example, the sentence which explains the relationship between the lives of rich and poor families: «In compenso, proprio perché i poveri erano così disperatamente poveri, le famiglie benestanti avevano molte domestiche, cameriere e bambinaie»[24] [On the other hand, it was exactly because the poor were so desperately poor that affluent households had multiple maids, servants and nannies], was inaccurately rendered as: «Jednak podczas gdy biednym tak źle się wiodło, w zamożnych domach nie brakowało pomocy domowych, służących i niań» [However, while the poor fared so poorly, affluent households did not lack maids, servants and nannies][25]. I have found wrongly translated words in the body of the novel as well; for instance, *naufragio* [shipwreck] was expressed as *powódź* [flood].

The Polish edition also contains the translation of a dedication to people who were an important presence in the writer's childhood and additionally includes twelve footnotes. All explanations are encyclopaedic and offer Polish readers cultural information, mainly concerning Italy. They are not signed, but they were presumably appended by the translator.

While there is no footnote when *A Little Princess* and its protagonist, Sara Crewe, are mentioned, a footnote accompanies *The Mystery of the Black Jungle* (*I misteri della giungla nera*). It provides Polish readers with a handful of information about Emilio Salgari, an author of action-adventure fiction, and his Sandokan series[26]. This decision is well-founded. Although the immensely popular Italian writer was published in Polish before the Second World War and some re-editions also appeared in the 1980s and 90s, he may not be very familiar to Polish readers, but his characters are deeply important to the protagonists of Pitzorno's book. The other footnotes associated with Italian culture refer to Edmondo De Amicis as the writer of *Heart*, Giovanni Pascoli as the author of a poem entitled *La cavalla storna* and the Sardinian-born poet Sebastiano Satta. Besides, explanations were deemed due to Italian heroes Cesare Battisti, Giuseppe Mazzini, Enrico Toti and Silvio Pellico[27], as well as to gianduia, a variety of chocolate. As far as references to other cultures are concerned, two footnotes are devoted to the comic-strip character Mandrake[28] and the pioneer

[24] Pitzorno, *Ascolta il mio cuore*, cit., p. 7.

[25] Pitzorno, *Posłuchaj mojego serca*, cit., p. 5.

[26] The writer's date of birth is wrongly cited (1863 instead of 1862). Pitzorno, *Posłuchaj mojego serca*, cit., p. 29.

[27] The latter name is correctly spelt in the footnote, but incorrectly (*Perlico*) in the text of the translation. Pitzorno, *Posłuchaj mojego serca*, cit., p. 390.

[28] In the translation, this name is not inflected, which is a grammatical mistake in Polish. Pitzorno, *Posłuchaj mojego serca*, cit., p. 77.

of women's literature Louisa May Alcott, while one to the figure of Fantômas associated with French culture.

The novel features a numerous host of characters. Pitzorno announces and explains this at the end of her introduction:

> La cosa più importante, allora come oggi, erano i rapporti tra le persone. E nel caso dei bambini, i rapporti con i coetanei da un lato, e dall'altro col mondo spesso incomprensibile degli adulti. È questo il motivo per cui nelle pagine seguenti incontrerete un numero così abbondante di personaggi, ognuno dei quali importantissimo nella vita delle tre protagoniste[29].

Plentiful characters are involved in the events related in the story, and several other people are additionally mentioned: the three protagonists' classmates[30], their family members and deceased relatives and other inhabitants of their town. There are 102 anthroponyms referring to them in the book. All the surnames were transferred unchanged to the translation, in which they serve as a collective signal of foreignness – Italianness. The first names of the characters in the central narrative of the novel (64) were given various handlings. Most of them (47) were left unchanged, but eight names are identical in Italian and Polish cultures. Exonyms were clearly used in ten cases.

The text also evokes historical and literary figures (65 anthroponyms in total, therein first names, surnames and sobriquets). In the translation, three less recognisable names of literary characters were dropped altogether, and the other names in this group were rendered in conformity with the Polish usage (through reproduction or exonyms, depending on the category). Giuseppe Mazzini, a hero of the Italian Risorgimento, is accompanied by a wrong intratextual gloss, calling him a *poet*.

The anthroponomic layer of the novel is augmented by the first names and surnames of characters in Prisca's stories. There are twenty-seven anthroponyms at this narrative level, and the auctorial intention is particularly clear in their case.

The etymology of the central protagonist's name (Prisca) is explained in the text through a lecture given by a hated teacher, who on this occasion expresses her surprise that the girl's parents did not choose to call her Priscilla, a more graceful name (a diminutive of Prisca). In the original, the word *prisca* is defined as the feminine form of the adjective *priscus*: «È una parola latina,

[29] Pitzorno, *Ascolta il mio cuore*, cit., p. 9. [What mattered most, then as now, were relationships among people. And in the case of children, relationships with peers on the one hand, and with the often-incomprehensible world of adults on the other. This is the reason why in the following pages you will meet such an abundant number of characters, each of them very important in the lives of the three protagonists].

[30] All the schoolgirls are listed by first name and surname in a schema of the 4D-grade classroom drafted by Argia Sforza and included in the edition of the original which I cite here (p. 55). This schema is not reproduced in the Polish edition.

il femminile di un aggettivo, *priscus*, che significa 'antico,' 'd'altri tempi'»[31]. In the translation, the protagonist is called Priska (which corresponds to the pronunciation of the original name), although there is a Polish exonym *Pryska*; the word *prisca* as such does not appear at all in the Polish text. As a result, the explanatory sentence – «This Latin word, the feminine adjective *priscus* means antique, from a different time»[32] – is imprecise and even faulty. Imprecision in defining the source of the anthroponym is also visible in the footnote which elucidates the name of fictitious *Fantomas* [Fantômas]: «Fantomas pochodzi od francuskiego słowa fantom, czyli duch» [Fantomas is derived from the French word fantom, which means a ghost][33]. In fact, the French word is *fantôme*.

The plot of the novel revolves around the fight which a group of girlfriends puts up against an unfair teacher, who is called *Argia Sforza* in the original and in the translation. Pitzorno picked up the first name *Argia* from Greek mythology. The surname *Sforza* is well known to Polish readers due to Queen Bona, the wife of the King of Poland Sigismund I the Old. The new teacher is contrasted with her favourably appraised predecessor. The latter's name, *Sole* [Sun] also evokes positive connotations. While the direct associations are evacuated when this anthroponym is transferred unchanged to the translation, the difference in the auditory perception of *Argia Sforza* and *Sole* is retained (and favours the latter).

Prisca's negative sentiments about Argia Sforza are vented in constructing her literary avatars, which are given telling names of a distinctly negative resonance: (1) Arpia Sferza – «Harpia Sferza, inaczej [= that is] Harpia Gwałtowna»; (2) Arcigna Storta – «Arcigna Storta, inaczej [= that is] Paskuda Krzywicka»; (3) Agonía Smorta – «Agonia Smorta, czyli inaczej [= that is] Agonia Blada»; and (4) Argus von Sfortzesky (a masculine avatar: a brutal Austrian general; procedure: reproduction). The translations of these anthroponyms three times rely on the intertextual gloss combined with other techniques. In (1), substitution (*arpia – harpia* [harpy]) and reproduction (*sferza = whips/scourges/denigrates*) are augmented with amplification, which repeats one element (Harpia/Harpy) and approximates the meaning of the other (gwałtowna = violent). In (2), the original first name and surname are transferred unchanged to the translation and doubled with an analogous pair of descriptive names (*paskuda* = eyesore; *Krzywicka* is a feminine surname derived from the adjective *krzywa* = crooked). In (3), a similar strategy is used (*smorta = blada*, English: pale), with a small adaptation (Agonía – Agonia; English: agony). The translator also resorted to the double technique when rendering another telling name from the same story by Prisca: contessa Princisbecco – hrabina (= countess Princisbecco

[31] Pitzorno, *Ascolta il mio cuore*, cit., p. 51.

[32] Pitzorno, *Posłuchaj mojego serca*, cit., p. 79. «To łacińskie słowo, przymiotnik w rodzaju żeńskim *priscus* znaczy antyczny, z innych czasów».

[33] *Ibid*., p. 77.

Tombakowska). However, the Polish-sounding surname derived from *tombak* [Italian: princisbecco; English: tombac] less evidently connotes a response to an unwelcome surprise, which is conveyed in the Italian idiom *restare* (*rimanere*) *di princisbecco*.

Two revealing names are given to animals in the novel: a cat is called *Ciccio* (*Grubas*/Fatty) and a tortoise is called *Dinosaura* (*Dinozaura*/She-Dinosaur). In the translation, both were rendered by descriptive names, whereby the feminine gender of the tortoise had to be additionally marked (*żółwica*, English: she-tortoise), while in Italian this animal is originally a feminine noun (*tartaruga*).

In the translation, all the characters' surnames (except the 'literary' avatars of Argia Sforza) are reproduced and consequently contribute to exoticisation and conjure up Italianness. However, the first names were inconsistently handled. For some of them, the translator used exonyms (Gabriele – Gabriel, Elisa – Eliza, Alessandra – Aleksandra, Adelaide – Adelajda, Lucrezia – Lukrecja), while she left some of them in their Italian form even though they have entrenched Polish equivalents (Casimiro [Kazimierz], Domenico [Dominik], Ursula [Urszula], Baldassare [Baltazar], Leopoldo [Leopold]). In some cases, it is inconclusive whether reproduction or an exonym was employed as the Italian and Polish forms are identical (Renata, Emilia, Anna).

Polissena del Porcello

The translation of *Polissena del Porcello* was Pitzorno's third book to be published in Poland[34]. Like the original, the Polish edition contains illustrations by famous Quentin Blake[35]. Danuta Ściborowska-Wytrykus, the translator of the book, produced about ten other translations in 1997-2007. Her body of work, besides self-help books, albums and a range of non-fiction (on basketball, Italian cuisine, cocktails, clocks, the impressionists and the times of Jesus), includes two fiction books, both of them published by Prószyński i S-ka. One of them is *Cento colpi di spazzola prima di andare a dormire*, 2003 [One Hundred Strokes of the Brush before Bed] (*Sto pociągnięć szczotką przed snem*, 2005), an erotic novel of meagre literary quality by Melissa P. (Panarello); and the other is Pitzorno's novel for children, which appeared in Poland in 2006.

[34] B. Pitzorno, *Polissena del Porcello*, Milan, Mondadori, 1993 (ebook ISBN 9788852023811); Polish transl. *Poliksena i prosiaczek*, Warszawa, Prószyński i S-ka, 2006.

[35] Both the note on the illustrator in the Italian edition cited here (absent in the Polish version) and the book description on the website of its Polish publisher mention Blake's illustrations to Dahl's books: «Here is an explosion of surprises and unconventional narrative ideas, complete with witty drawings by Quentin Blake, whom Polish readers know from Roald Dahl's books.» <https://www.proszynski.pl/index.php?mod=products&showall=1&dat=2007&page=3> (last access: 12.01.2020).

The action of the novel revolves around a highly popular literary motif of the foundling. The eponymous protagonist is a flamboyantly imaginative eleven-year-old girl who lives a happy life amidst her merchant family, in an indefinite country which has some typically Italian features (Italian-sounding toponyms) in an indefinite past (inferably, at the end of the 18th century). The girl adds some dramatic quality to her peaceful childhood by imagining that her mother and father are not her real parents. One day, she finds out that she was indeed adopted by them. She runs away from home in order to discover her true identity. On her journey, she has innumerable unpleasant adventures, which she shares with another girl of similar age, who seems an orphan as well. The other girl is an enterprising owner of an itinerary circus with some tamed animals. Following one clue after another, the travellers arrive at an abode of decrepit retired pirates, at a poor fisherman's humble hut at the seacoast, a royal court, an inn for selected guests, a country wedding and a hermitage of an ascetic stylite. Finally, the girl learns that she has in fact been raised by her real parents, who by an extraordinary coincidence took in a convent foundling who was actually their own previously stolen daughter. She happily reunites with her family. Nevertheless, the story is far more complicated as it involves as many as three girls whose early childhood was enveloped in mystery. A reviewer observes that attentive readers will not fail to notice markers of parody, but she believes that they appear too late in the novel:

> Bianca Pitzorno's cunningly constructed novel keeps readers in suspense from its first page on. However, towards the end of the book, when unbelievable events ludicrously proliferate implying the author's clearly parodistic intents, some readers are bound to feel disappointed. The writer has made them believe that they are reading an old-fashioned adventure story for good girls far too long. And she has invited them to play with conventions with her far too late[36].

The reviewer aptly emphasises «the author's clearly parodistic intents». Her appraisal might have been less critical if the Polish edition contained the afterword, in which Pitzorno reveals the genesis of the book to her readers. In the peritext, which was not translated into Polish, the writer presents herself as a reader of several stories about children abandoned by their parents and foundlings who invariably imagine that their mighty and wealthy parents have lost their child not by their fault. Pitzorno's idea was to utilise and multiply the typical motifs of these novels in order to «make readers smile by offering them a loving parody of all the tearful novels which [the author] has chanced upon in her life as a reader»[37]. Additionally, the translation of the body of the text omits

[36] L. Bardijewska, *Igraszki z wyobraźnią*, «Nowe Książki», vol. 1, 2007, p. 76.

[37] Pitzorno, *Polissena del Porcello*, ebook, cit., loc. 3506. «Volevo fare sorridere il lettore offrendogli una affettuosa parodia di tutti i romanzi strappalacrime che ho incontrato nel corso della mia vita di lettrice».

a paragraph in which Polissena reflects on «foolish» mothers who, deceived by «a kiss or a smile», easily take a strange child for their own one[38].

The novel uses 77 names of people and animals, surnames and sobriquets. Twenty-six of them were transferred unchanged to the translation, therein all the surnames, except a descriptive name which signals the viciousness of the inn owner, which was rendered by means of substitution (Aspra – Goryczkowa; English: Ms Bitter)[39], and literally translated nicknames (e.g. *Il Terrore dei Mari in Calze Rosse – Postrach Mórz w Czerwonych Pończochach*; English: Terror of the Seas in Red Tights). The translator used a calque to convey the telling names of a ship and a whip, as well as meaningful toponyms (Roccabrumosa – Zamglona Skała; English: Misty Rock)[40]. As for human names, recognised Polish equivalents were used whenever possible (Vittoria – Wiktoria), except Pacuwiusz (instead of Pakuwiusz) as the counterpart of Pacuvio, and Lucullo, which was transferred from the original even though there is a Polish exonym: Lukullus.

Stemming from mythology, Polissena, the first name of the eponymous character, is of course the most important anthroponym in the novel. The Polish version uses the entrenched Polish equivalent: Poliksena. At the beginning of the novel, in both language versions, readers are informed that it was the name «of one of Priam's many daughters, and it is a grave mistake to pronounce it with a stress on the 'i', which is what maidservants or stable boys sometimes did»[41]. At a certain point in the narrative, Polissena dresses up as a boy and takes a male alias with a sobriquet. The translation uses an exonym and a calque for this name: Ludovico il Ragno – Ludwik Pająk [English: Louis the Spider][42].

As far as the eponymous piglet (*porcello*) is concerned, the narrative includes a symbolic act of bestowing an artistic pseudonym on the animal. In the source text, it is Biancofiore, a name borrowed from a medieval legend. Its counterpart in the translation is Rumianek [English: Chamomile], which belongs to quite a different language register, though it is admittedly associated with a white flower.

In the original title, «piglet» is capitalised, which suggests that it is a proper name closely linked to the protagonist's first name: *Polissena del Porcello*

38 Pitzorno, *Polissena del Porcello*, cit., loc 2193; *Poliksena i prosiaczek*, cit., p. 216.

39 But the translation retains the surname of Polissena and her parents: Gentileschi, which was in all likelihood inspired by the Baroque painter Artemisia and carries positive associations aligned with the protagonist's character (*gentile – nice, noble*).

40 The text contains several place names, which is linked to the novel's central motif of the journey. Two toponyms are real, but they refer to remote regions. Recognised equivalents were used in their translation (e.g. Punjab – Pendżab). The other names might well be Italian names. They were transferred to the Polish version unchanged, including accent markers (Pratàle – Pratàle).

41 Pitzorno, *Poliksena i prosiaczek*, cit., p. 11.

42 Lucrezia, the other girl who accompanies Polissena on her journey, also appears as a boy – Lucrezio – at a certain point in the plot. On one occasion, the Polish version (p. 207) mistakenly uses the feminine form (Lukrecja) instead of the masculine one (Lukrecjusz).

[Polyxena of the Piglet]. However, the title of the translation has «piglet» spelt in lower case and combined with the protagonist's first name by means of the conjunction *i* [English: and]: *Poliksena i prosiaczek* [Polyxena and the piglet]. Consequently, solely the Italian title refers to one of the alternative identities of the eponymous protagonists, whom the stylite hermit saw with a piglet (recognised as an attribute) and remembered as «santa Polissena del Porcello» – «święta Poliksena z prosiaczkiem» in the Polish translation [English: Saint Polyxena with a piglet].

La casa sull'albero

La casa sull'albero is the last of Pitzorno's works to appear in Polish so far[43]. The translation was commissioned to Joanna Raban, a rather unknown translator[44]. The Polish translation omits the *Afterword* [Postfazione], in which the author explains the genesis of the book. As reported by Pitzorno, it was inspired by her friendship with then-three-year-old girl Aglaia, which started in the mid-1970s. The grown-up Bianca would spend a lot of time with the girl, playing with her, making cycling outings, talking with her about a variety of things and listening to her advice on TV shows Pitzorno was making for RAI. When Aglaia was a first-grade student, Pitzorno wrote for her a short story in which the girl was cast as the protagonist and her family as other characters. A few years later, the writer published *La casa sull'albero* as a response to the girl's letter which recalled her adult friend once saying that she would like to dwell up in the tree and articulated her own dream of making this plan a reality together. These explanations develop the idea briefly expressed in the dedication (translated into Polish): «dla Aglai, która rzeczywiście istnieje, tak samo jak Bianka, która jest nikim innym jak autorką» [«For Aglaia, who exists for real, as does Bianca, who is none other than the Author»][45].

As can be seen, the book is founded on an «understanding between an adult and a child»[46]. However, in the above-cited review by Mikrut both protagonists are presented as young girls. This cannot be blamed on the reviewer; if anything, the translator and the Polish publisher are responsible for this misunderstanding.

[43] B. Pitzorno, *La casa sull'albero*, Milan, Mondadori, 1990, ebook ISBN 9788852023842; Polish transl. *Magiczny domek*, Warszawa, Prószyński i S-ka, 2007.

[44] The catalogues of the National Library do not register any other books authored or translated by Joanna Raban.

[45] B. Pitzorno, *The House in the Tree*, transl. by S. Parkin, Richmond, Alma Books, 2017.

[46] Ożóg-Winiarska, *Włoska literatura dla dzieci i młodzieży w zbliżeniach polskich*, cit., p. 96; D. Lombello, *Tematy literackie i modele wychowawcze w literaturze dla dzieci i młodzieży we Włoszech*, in G. Skotnicka (ed.), *Tradycje narodowo-kulturowe w literaturze dla dzieci i młodzieży*, Warszawa, SBN, 1996, p. 140.

A young girl and an adult woman are clearly pictured in illustrations by Blake in both Italian and Polish editions and in the reproduction of the book cover accompanying its review printed in «Guliwer». The misrepresentation in the Polish reception is attributable to the fact that the afterword, which recounts the origin of the book, and the peritext, which precedes the narrative and relates that little Aglaia and her «big» (i.e. «adult») friend decided to settle in the tree, were dropped from the Polish translation. Additionally, the original text of the novel early announces that «Aglaia aveva otto anni, e abitava sull'albero insieme alla sua amica Bianca, che invece era una persona grande» [«She [Aglaia] was eight years old and lived in the tree with her friend Bianca. Bianca was a grown-up»][47]. The translation produces a series of semantic and structural manipulations, resulting in: «Czyżby na drzewie ktoś mieszkał…? Otóż to. Od niedawna jego lokatorkami stały się ośmioletnia Aglaja wraz ze swą starszą przyjaciółką Bianką» [Was anyone living in the tree by any chance? Indeed. It had two recent tenants: eight-year-old Aglaia and her older friend Bianca][48]. A few paragraphs later, the sentence with «Bianca e Aglaia» as its implied grammatical subject was transformed into a sentence with *dziewczyny*, i.e. the girls, in the subject position. Readers are in fact invited to surmise that Bianca is perhaps ten or twelve years old.

The fantastic adventures of the two friends take place in a geographically indefinite place, with the setting becoming increasingly fair-tale-like as the narrative progresses. This fabular quality is immediately indicated in the title of the translation, which changes the original *La casa sull'albero* [The House in the Tree] into *Magiczny domek* [A Little Magical House].

The novel is the shortest of all Pitzorno's texts translated into Polish, which is one reason why it contains the fewest anthroponyms (32). The main protagonists' names were conveyed by adaptation (Aglaia – Aglaja) and exonym (Bianca – Bianka), which actually dilutes the connection between the author and her alter ego in the novel. The translations of the names of the dog, the she-dog and the feline rely, respectively, on an exonym (Amedeo – Amadeusz), reproduction (Dorotea – Dorotea) and adaptation (Prunilde – Prunilda). No changes were made in the surnames featuring in the text (Brullo, Ceglie), and the potential first names of newborns (Cunegonda, Medardo, Porfirio, Gaudenzio) were left unchanged, even though they have their equivalents in Polish (Kunegunda, Medard, Porfiriusz, Gaudencjusz). The dictionary counterparts were used instead of names fashioned by capitalising common nouns (Wolframio – Wolfram, Tungsteno – Tungsten). Potential names taken from the calendar, which are in fact words for religious holidays, were supplanted with other ones, whereby religions and cultures were freely changed: Inalbi (from «Sunday

[47] Pitzorno, *La casa sull'albero*, cit., loc 44; English transl., *The House in the Tree*, cit., p. 4.
[48] Pitzorno, *Magiczny domek*, cit., p. 8.

in albis») – Halloween, Purif – Popielec [Ash Wednesday], Di passione (from «Domenica di passione», i.e. Passion Sunday) – Divali.

At places, the Polish text was written anew, with the use of amplifications and cuts (for example, the ending of the first chapter depicting the effects of one protagonist's gardening passion was removed). Besides, the translation swarms with basic mistakes. *Sacco a pelo* [A sleeping bag] was translated as «a bag filled with bristle», *recitare commedia* [performing a theatre play] as «reciting poetry», *impudenza* [impudence] as «imprudence» [Italian: imprudenza] and *confetto* [a dragée] as *confetti*.

Conclusions

This comparative reading confirms Pitzorno's inexhaustible imagination in coining proper names. Characters' names basically never recur. My analysis also suggests that Christiane Nord was right to claim that «translators do not always use the same techniques with all the proper names of a particular text they are translating»[49]. All the analysed translators employed different techniques, though the range of their procedures was not broad. Omission only happened exceptionally, and no proper names were replaced by generic nouns. In one case neutralisation was used (*Polissena del Porcello*: Biancofiore – Rumianek/Chamomile).

Polish readers were denied access to some peritexts. At the same time, the translator's footnotes and intertextual glosses only occur in the translation of *Ascolta il mio cuore*. This should not come as a surprise since the book contains the largest number of cultural allusions. This is related to the theme of the work, whose narrative predominantly focuses on school life and features avid readers as the protagonists, one of whom is a beginner writer. Regrettably, besides useful encyclopaedic information, the two types of glosses offer misleading explanations as well.

Nearly in all cases, telling anthroponyms were rendered as descriptive names. At the same time, on several occasions, the translators failed to use the existing exonyms.

The translators of *Ascolta il mio cuore* and *La casa sull'albero* were the least consistent in their selection of techniques for translating proper names. However, one of them worked on a far longer text than the other. Besides, the selective application of exonyms (even if some of them do exist) in the former translation can be justified by the genre of the book – an autobiographic novel whose action is set in Italy at a specific moment in time. The translator could be understandably torn between the necessity of exoticisation and the need of

[49] Nord, *Proper Names in Translations for Children*, cit., p. 183.

domestication. The latter book, *La casa sull'albero*, though also associated with Pitzorno's life, is quite a different case due to its explicit fairy-tale investment.

The Polish versions were produced both by experienced and prolific translators and by entirely unknown ones. None of them is free from mistakes. The last translation published in Poland displays the most nonchalant attitude in this respect. Thus, the Polish reception of Pitzorno can be viewed as prevalently discontinuous (different publishers, different translators, long time intervals between translations) and insufficiently committed to the quality of translations.

Does the first-published translation essentially differ from the later ones? While one could expect increasing exoticisation, it is actually in *Clorofilla dal cielo blu* that reproduction was employed with the greatest consistency.

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From outside the Iron Curtain: censorship and translations of Western children's and young-adult literature in people's Poland under Stalinism (1948-1956)

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ABSTRACT: The aim of the article is to show the ways in which the censors of the Central Office for the Control of the Press, Publications, and Performances (*Główny Urząd Kontroli Prasy, Publikacji i Widowisk*) assessed translations for children and young adults from behind the Iron Curtain to be published in the Stalinist period of People's Poland (1948-1956). Our exploration is based on censorial reviews collected at the Central Archives of Modern Records (*Archiwum Akt Nowych*) in Warsaw. Our paper develops in four stages. First, we describe the foundation and operations of the censorship agency in People's Poland, and then we outline the process in which the publishing market was subordinated to the central authorities. Subsequently, we discuss the censorial review as a type of text. Finally, we analyse censorial reviews to identify the criteria used by censors in their assessment of translations of Western children's and young-adult literature.

EET/TEE KEYWORDS: Children's and young adult literature; Censorship; Poland; XXth Century.

Introduction

Censorship can be understood both as a form of repression linked to dictatorship and propaganda and more broadly as any (also self-imposed) communication control. Discussing translation, Francesca Billiani perceives censorship as «an act, often coercive and forceful, that – in various ways and

under different guises – blocks, manipulates and controls the establishment of cross-cultural communication»[1]. Thus, in a complex process of cross-cultural transfer encouraged by translations, censorship functions as a filter[2].

Censoring communication with children and young adults is a special case, as it involves additional factors related to the age of implied readers. This is shown in recent studies on the knotted relations between translations of children's and young-adult literature and institutional censorship under dictatorships, primarily pro-fascist (Mussolini's in Italy[3], Franco's in Spain[4], and *Estado Novo* in Portugal[5]) and communist ones in the Eastern Bloc countries: the USSR[6], Yugoslavia[7], East Germany[8], and China[9].

[1] F. Billiani, *Assessing Boundaries – Censorship and Translation*, in F. Billiani (ed.), *Modes of Censorship: National Contexts and Diverse Media*, Manchester/Kinderhook, St. Jerome Publishing, 2007, p. 3.

[2] *Ibid*.

[3] See e.g. S. Morganti, *Il fascismo alla ricerca di una «nuova letteratura infantile»*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, Milan, FrancoAngeli, 2004, pp. 240-250; M. Castoldi (ed.), *Piccoli eroi. Libri e scrittori per ragazzi durante il ventennio fascista*, Milan, FrancoAngeli, 2016; S. Fava, *Percorsi critici di letteratura per l'infanzia tra le due guerre*, Milan, V&P, 2004, pp. 169-228.

[4] M. Fernández López, *Translation Studies in Contemporary Children's Literature: A Comparison of Intercultural Ideological Factors*, «Children's Literature Association Quarterly», vol. 25, n. 1, 2000, pp. 29-37; M. Fernández López, *Comportamientos censores en la literatura infantil y juvenil traducida del inglés en la época franquista: Establecimiento de un corpus textual*, in R.M. Álvarez (ed.), *Traducción y censura en España (1939-1985). Estudios sobre corpus TRACE: cine, narrativa, teatro*, León, Universidad de León, 2007, pp. 19-48; J. Vandaele, *It Was What It Wasn't: Translation and Francoism*, in Ch. Rundle, K. Sturge (edd.), *Translation under Fascism*, New York, Palgrave Macmillan, 2010, pp. 84-116; J. Lin Thompson, *Censorship and the Translation of Children's Literature: The Adventures of Huckleberry Finn in Franco's Spain (1939-1975)*, in L. Pintado Gutiérrez, A. Castillo Villanueva (edd.), *New Approaches to Translation, Conflict and Memory. Narratives of the Spanish Civil War and the Dictatorship*, London, Palgrave Macmillan, 2019, pp. 113-141; P.C. Cerrillo Torremocha, C. Sánchez Ortiz (coord.), *Prohibido leer: La censura en la literatura infantil y juvenil contemporánea*, Cuenca, Ediciones de la Universidad de Castilla – La Mancha, 2016.

[5] T. Seruya, *Translation in Portugal during the* Estado Novo *Regime*, in Ch. Rundle, K. Sturge (edd.), *Translation under Fascism*, cit., pp. 117-144.

[6] J.A. Inggs, *Censorship and Translated Children's Literature in the Soviet Union: The Example of the* Wizards Oz and Goodwin, «Target», vol. 23, n. 1, 2011, pp. 77-91; J.A. Inggs, *Translation and Transformation: English-Language Children's Literature in (Soviet) Russian Guise*, «International Research in Children's Literature», vol. 8, n. 1, 2015, pp. 1-16.

[7] N.K. Pokorn, *Post-Socialist Translation Practices: Ideological Struggle in Children's Literature*, Amsterdam, John Benjamins, 2012.

[8] G. Thomson-Wohlgemuth, *Translation under State Control: Books for Young People in the German Democratic Republic*, New York, Routledge, 2009.

[9] J. Lin, *La censura de los libros traducidos para niños bajo los contextos políticos diferentes.* Huckleberry Finn *bajo la dictadura de Franco en España (1939-1975) y la de Mao Zedong en China (1949-1976)*, in Cerrillo Torremocha, Sánchez Ortiz (coord.), *Prohibido leer: La censura en la literatura infantil y juvenil contemporánea*, cit., pp. 255-264; M. Yuan, *The Translation of Sex-Related Content in* Peter Pan *in China*, «Translation Studies», 2019 (DOI: 10.1080/14781700.2019.1604256).

Research has also focused on the impact of censorship on imported children's and young-adult literature in the USSR-dominated Poland (1944-1989)[10], a period colloquially and propagandistically referred to as People's Poland. The state was officially called the Republic of Poland until 1952 and the People's Republic of Poland from 1952 to 1989. Since, throughout the period, «children were highly prized targets of indoctrination»[11], children's and young-adult literature was strictly monitored, as reported by Tomasz Strzyżewski, a Cracow-based censor who fled Poland in 1977 and revealed the mechanisms and practices of censorship. In an interview, Strzyżewski emphasised that social groups were graded in terms of the urgency of censorial interventions: «Children and youths», he said, «must not be exposed to any doubts»[12].

Under such circumstances, translations of literature for young readers from the allegedly ideologically hostile capitalist countries were expectedly submitted to especially meticulous control by censors. Of course, such translations made up a small portion of literary imports, which basically flowed to Poland from the USSR and its satellite countries, primarily from Czechoslovakia, East Germany, Hungary, and Romania. This disproportion was particularly pronounced in the so-called Stalinist period[13], when the system of government modelled on Joseph Stalin's centralised dictatorship was implemented in Poland. The percentage of translations from Russian and other languages of the USSR skyrocketed from 1% in 1947 to 17.5% in 1950[14]. This staggering increase was also mirrored in children's and young-adult literature, with the corresponding proportion in this sector rising from

[10] M. Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, in G. Gzella, J. Gzella (edd.), *Nie należy dopuszczać do publikacji. Cenzura w PRL*, Toruń, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, 2013, pp. 99-122; R. Looby, *Censorship, Translation and English Language Fiction in People's Poland*, Leiden/Boston, Brill/Rodopi, 2015; K. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, Warszawa, SBP, 2018; N. Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1918-2014)*, Kraków, Universitas, 2018.

[11] Looby, *Censorship, Translation and English Language Fiction in People's Poland*, cit., p. 155.

[12] Interview with T. Strzyżewski by A. Koraszewski, «Aneks: kwartalnik polityczny», n. 16/17, 1977, p. 206. Retrieved from <http://aneks.kulturaliberalna.pl/archiwum-numery/16-17-1977/> (last access: 11.03.2020). Polish publications and censorial reviews are quoted in our translation.

[13] Historians differ on the dating of the Stalinist period in Poland. We follow D. Jarosz in dating its start to 1948 (the foundation of the Polish United Workers' Party) and its end to 1956 (Khrushchev revealing some abuses of Stalin's regime). See D. Jarosz, *Polacy a stalinizm 1948-1956*, Warszawa, Instytut Historii PAN, 2000.

[14] A. Klimowicz, *Ruch wydawniczy w latach 1944-1953. Próba charakterystyki statystyczno-bibliograficznej*, Warszawa, Wydawnictwo Centralnego Urzędu Wydawnictw Przemysłu Graficznego i Księgarstwa, 1954, pp. 128-130.

17% in 1948 to 59.6% in the «record» year of 1951[15]. According to Adam Klimowicz's data, translations of Russian and Soviet texts for young readers published between 1944 and 1953 accounted for 35% while translations from other foreign literatures accounted for merely 8% of the entire publication volume[16]. Besides the Eastern Bloc languages, literary imports were mainly English, French, and Italian texts[17].

The aim of our paper is to identify the ways in which the censors of the Central Office for the Control of the Press, Publications, and Performances (COCPPP, *Główny Urząd Kontroli Prasy, Publikacji i Widowisk*) assessed translations of children's and young-adult books from behind the Iron Curtain to be published in the Stalinist period of People's Poland (1948-1956)[18]. This will help establish whether their criteria differed from those applied to Polish books and translations from the Eastern Bloc languages.

Our argument is based on censorial reviews collected at the Central Archives of Modern Records in Warsaw (*Archiwum Akt Nowych*)[19]. Our analysis covers over 50 censorial reviews of books translated mainly from French, Italian, and English[20] whose publication was planned by Nasza Księgarnia, the major publisher of literature for a young readership in People's Poland, and by other publishers in this sector (Iskry, Książka i Wiedza, Gebethner i Wolff). In comparing the approach to translations from Western literatures with the approach to Polish literature and translations from the Eastern Bloc languages, we build on the available literature on the relationship between censorship and literature in Poland[21].

15 F. Neubert, *Obraz polskiej literatury pięknej dla dzieci w okresie 1945-1964 w świetle liczb*, in I. Kaniowska-Lewańska (ed.), *Seminarium naukowe poświęcone literaturze dla dzieci i młodzieży w 20-leciu PRL*, Warszawa, Nasza Księgarnia, 1965, p. 29. After 1955, the proportion of translations dropped back below 20%.

16 Klimowicz, *Ruch wydawniczy w latach 1944-1953*, cit., p. 109.

17 See e.g. *Ruch Wydawniczy w Liczbach*.

18 In this article, we do not address other censorial practices, e.g. those bringing the existing book resources (collections at libraries and bookshops) in alignment with the ideological goals of the regime. For a discussion of this issue, see e.g. S.A. Kondek, *Władza i wydawcy. Polityczne uwarunkowania produkcji książek w Polsce w latach 1944-1949*, Warszawa, Biblioteka Narodowa, 1993; S.A. Kondek, *Papierowa rewolucja. Oficjalny obieg książek w Polsce w latach 1948-1955*, Warszawa, Biblioteka Narodowa, 1999; *Cenzura PRL. Wykaz książek podlegających niezwłocznemu wycofaniu 1 X 1951*, afterword by Z. Żmigrodzki, Wrocław, Nortom, 2002.

19 The archive of the COCPPP is preserved in archival set n. 2/1102 of the Archives of Modern Records. It includes «several thousand files (3.361 inventory numbers), a dozen folders […] and so-called drawers, which probably contain several thousand documents», M. Fik, *Cenzor jako współautor*, in B. Wojnowska (ed.), *Literatura i władza*, Warszawa, IBL, 1996, p. 132. The censorship records are incomplete; some of them are believed to have been deliberately destroyed around 1989.

20 For censorial reviews of translations from English, we rely on our own observations and cite insights offered by Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, cit.

21 See e.g. Fik, *Cenzor jako współautor*, cit.; S. Żak, *Cenzura wobec humanistyki*, Kielce,

1. *Institutional censorship in People's Poland*

A Censorship Department was already established in Poland in late August 1944. The agency was transformed into the Central Bureau for the Control of Press, Publications, and Performances in 1945 and renamed as the Central Office for the Control of the Press, Publications, and Performances in 1946, with the headquarters at 5 Mysia Str. in Warsaw. Its responsibilities were very vaguely known to the public, because «all information about its censorship activities was classified»[22].

Whatever contained any public information – including printed matter, radio broadcasts, TV shows, film footage, slides, art and entertainment events, information posters, and, starting in 1970, even product tags and administrative and financial forms – was subject to censorship[23].

The censorship office did not employ a lot of staff. In 1945, it had 51 censors, with the number rising to 383 one year later and remaining stable in the 1970s and '80s. Besides the full-time personnel of local censorship agencies, the office had other collaborators, such as translators and researchers, who were called non-staff censors[24].

The staff of the censorship office presupposed that all texts were politically loaded and, consequently, that their selection should be determined by political interests. Their pursuits were driven by the paramount goal of fostering a new mentality and desired behaviours through an aptly chosen literary repertoire. Literature was supposed to be above all, if not exclusively, «a guarantee of the political system in place»[25], a weapon of class struggle, a collective agitator and propagandist, and the organiser of the masses.

Under People's Poland, censorship was principally preventive: it eliminated undesirable content before it appeared in media. Books and non-periodical publications underwent four rounds of control (periodicals, three rounds). Censors first read manuscripts and, after possible revisions, issued typesetting permits, which allowed making printing matrices (preliminary censorship). Then

Wojewódzka Biblioteka Publiczna, 1996; J. Hobot, «Trzeci obieg» literatury: Cenzor jako odbiorca poezji nowofalowej, «Teksty Drugie», vol. 3, 1998, pp. 107-124; K. Budrowska, *Literatura i pisarze wobec cenzury PRL 1948-1958*, Białystok, Wydawnictwo Uniwersytetu w Białymstoku, 2009; M. Rogoż, *Polska literatura dla dzieci i młodzieży w okowach cenzury. Oceny wydawnicze książek z lat 1948-1956*, «Roczniki Biblioteczne», n. 56, 2012, pp. 55-81; Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, cit.; T. Strzyżewski, *Wielka księga cenzury PRL w dokumentach*, Warszawa, Prohibita, 2015; K. Kamińska-Chełminiak, *Cenzura w Polsce 1944-1960. Organizacja, kadry, metody pracy*, Warszawa, Wydawnictwo Uniwersytetu Warszawskiego, 2019.

[22] T. Strzyżewski, *Wstęp*, in *Strzyżewski, Wielka księga cenzury PRL w dokumentach*, cit., p. 29.

[23] Z. Romek, *System cenzury PRL*, in *Strzyżewski, Wielka księga cenzury PRL w dokumentach*, cit., p. 16.

[24] Romek, *System cenzury PRL*, cit., p. 21.

[25] A. Kamieńska, *Głos w dyskusji o czytelnictwie*, «Kuźnica», n. 25, 1948, p. 5.

they inspected the proofs and, with possible revisions, authorised the printing of the texts (censorship proper). Subsequently, censors read the published texts and, if no objections arose, certified their dissemination (follow-up censorship). When the entire printing run made it onto the market, the books on sale were controlled once again (secondary censorship)[26]. Each positive decision issued by the office was valid for only three months.

The awareness of institutional censorship affected creative practices by prompting writers to self-censor[27]. Self-censorship was also exercised by managers and editors at publishing houses when selecting texts for publication. Zbigniew Romek insists that the power of the censorship model established in People's Poland lay in that «writers themselves, creative practitioners, and the staff involved in developing publications or works of art» were made part of the control over written-down thoughts, so as to «make sure that only publishable texts should find their way onto the censor's desks»[28]. Romek cites statistics that imply that, in 1985, censors raised objection to merely 8% of magazines and bulletins and to just 0.7% of books!

2. *The publishing market in People's Poland*

The political forces that seized power in Poland[29] were quick to declare publishing «a site of political and ideological confrontation»[30], an idea already proclaimed in 1944. In 1947 the authorities launched efforts to eliminate all private and Catholic publishers. They were first beset by escalating constraints mounted through «directive (orders, bans, sanctions) and parametric (paper quotas, access to printing houses, distribution laws) policies»[31], and through smearing campaigns in the press. The ultimate blow was dealt to independent publishing by what came to be known as «the battle for trade», waged against the entire private sector. As a consequence of «Regulation on licensing publishers of books and non-periodical printed matter» of 21st September 1984, companies unaffiliated with the Party, though not forbidden to engage in editorial activities, were made thoroughly dependent on state-issued licences.

26 Romek, *System cenzury PRL*, cit., p. 16.

27 See e.g. Kondek, *Władza i wydawcy. Polityczne uwarunkowania produkcji książek w Polsce w latach 1944-1949*, cit., p. 34.

28 Romek, *System cenzury PRL*, cit., p. 16.

29 In December 1948, the Polish Workers' Party absorbed the Polish Socialist Party and transformed into the Polish United Workers' Party.

30 Kondek, *Władza i wydawcy. Polityczne uwarunkowania produkcji książek w Polsce w latach 1944-1949*, cit., p. 16.

31 Kondek, *Papierowa rewolucja. Oficjalny obieg książek w Polsce w latach 1948-1955*, cit., pp. 16, 98, 114, 141-153.

Such licences were not required of state-run and state-managed publishers, which gained a monopoly in the re-organised publishing system in the early 1950s. As their supreme principle, these publishers (called «socialist publishers»[32]) repudiated any continuity with the capitalist book market, which was labelled as «non-progressive». An overwhelming majority of these publishers were subordinated to the state-and-party apparatus, with many of them founded by the governing political parties with a view to spreading their ideology. Therefore, it should not come as a surprise that they embraced various forms of self-censorship in internal decision-making. Romek even calls their activities «a co-censoring of publishing materials» and insists that they were a common practice[33]. Among the publishing houses subordinated to the government, there were publishers of children's and young-adult literature in the first post-war decade, such as Nasza Księgarnia, Iskry, Książka i Wiedza.

3. *The censorial review*

Anna Wiśniewska-Grabarczyk defines the censorial review as

> […] a cryptotext (a non-public text) of purposefully limited distribution, anchored in the state apparatus, discussing and assessing a text of culture (a literary, theatrical, film, or other work) and produced by the employees of the Central Office for the Control of the Press, Publications, and Performances […] and its local agencies, usually using a special form, between 1944 and 1990[34].

The review forms (two-sided A4 sheets) were typed or handwritten[35]. One book was usually assessed by two and sometimes three censors. The first part of the form listed the title and the subtitle of the book, the name of the author, the publisher, and the print run as well as stating whether the book was new, re-edited, original, or translated. The date of receipt by the official was also given. The study of numerous reviews suggests that reviewers returned the completed forms within a month of receiving them.

The main part of the review defined «the themes and subject matter of the book» together with its «ideological and socio-educational relevance». Subsequently, the reviewer detailed interventions in the text, providing a short justification, and then in the «The reviewer's recommendation», stated the

[32] This is the formulation of A. Bromberg, *Książki i wydawcy*, Warszawa, PIW, 1966, p. 18.

[33] Romek, *System cenzury PRL*, cit., p. 16.

[34] A. Wiśniewska-Grabarczyk, *Recenzja cenzorska Polski Ludowej – Materiały do* Słownika Rodzajów Literackich, «Zagadnienia Rodzajów Literackich», vol. LIX, n. 1, 2016, p. 97.

[35] Reviews were sometimes written on ordinary sheets and even on pieces of paper, as exemplified by the review of A. Daudet's short stories *Listy z mojego młyna* (original title: *Lettres de mon moulin*, 30.08.1948).

suggested decision as to authorising the printing. This part offered the following options for the books that were submitted to the office for the first time:

The reviewer's recommendation (delete as applicable):
a. authorise
b. do not authorise
c. authorise after interventions.

And for re-editions:
The reviewer's recommendation (delete as applicable):
I. The book can be re-edited:
    a. without revisions
    b. with some revision.
II. The book cannot be re-edited.
III. The book is appropriate for school libraries.
IV. The book is appropriate for general public libraries.

The last point of the form included the final decision to permit – or, for that matter, not to permit – the printing of the book, based on the reviewers' assessments.

Although, as emphasised by Rogoż, foreign literary works were, «as a rule, assessed more meticulously than domestic literary production»[36], most reviews are otherwise concise and fragmentary, with more elaborate, multi-page reviews being exceptions rather than the rule[37]. Censors were under no obligation to state any reasons for their evaluations, and the censorship office did not have to justify their decisions to writers and publishers.

4. *Translations of children's and young-adult literature from behind the Iron Curtain: the censors' view*

As stressed by Billiani, «censorship operates largely according to sets of specific values and criteria which are established by a dominant body over a dominated one»[38]. Censorship of children's and young-adult literature in People's Poland was predominantly informed by ideological criteria, with educational and literary aspects playing a secondary role.

Such a gradation of priorities resulted from the official views on the education of the young generation under People's Poland, where commitment to the socialist cause was absolutely crucial. A pivotal moment in this respect

[36] Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach cenzury*, cit., p. 103.

[37] See e.g. an eight-page review of R. Roth's *Młody wygnaniec* [A Young Exile] (original title: unknown) of 19.02.1948.

[38] Billiani, *Assessing Boundaries – Censorship and Translation*, cit., p. 4.

came in 1948, when the Stalinisation of children's education commenced. By intensifying indoctrination policies in schooling and education, the communist authorities effected a total re-interpretation of the previous pedagogical tradition, which was exemplified in «criticising the legacy of Janusz Korczak […] and the espousal of collectivist Soviet concepts championed by Anton Makarenko»[39].

One year later, at the Congress of the Polish Writers' Union in Szczecin, the assembled writers and literary critics adopted so-called real socialism as the obligatory model for literature. «Socrealism» was touted as progressive and socially needed literature whose value resulted from its utility for building the socialist system. Children's and young-adult literature was the focal point discussed by the Main Board of the Polish Writers' Union at a special conference in 1951, when the aims of literature for a young readership were depicted as follows:

> The task of children's and young-adult literature is to educate builders of Socialist Poland to be upright sensitive citizens, aware of the magnitude of the goals set for them by our times, capable of overcoming difficulties, and prepared for privations and sacrifices in the struggle against the enemies of our system[40].

Given this, the «educational merit in the spirit of Marxist-Leninist philosophy»[41] became the basic criterion behind the selection of texts for young readers, with pedagogical and literary criteria treated as secondary.

4.1 *Ideological criteria*

In December 1949, censors were instructed that «Class struggle is exacerbating. The enemy's attacks are increasingly violent and perfidious. […] You are the apparatus for denouncing the enemy»[42]. Class struggle was also evoked in conjunction with the goals of young-adult literature. Grzegorz Lasota, a Party-associated literary critic, insisted that, «[…] like books for adults, books for youth should present the whole complicated dialectics of life, a sensitive mechanism of class struggle»[43].

[39] D. Jarosz, *Główne kierunki działalności państwa w zakresie stalinizacji wychowania dzieci w Polsce w latach 1948-1956*, «Mazowieckie Studia Humanistyczne», n. 2, 1998, p. 106.

[40] *Rezolucja II Rozszerzonego Plenum ZG ZLP*, «Twórczość», n. 8, 1951, p. 151.

[41] Kamińska-Chełminiak, *Cenzura w Polsce 1944-1960. Organizacja, kadry, metody pracy*, cit., p. 165.

[42] D. Nałęcz (ed.), *Główny Urząd Kontroli Prasy 1945-1949*, Warszawa, Instytut Studiów Politycznych PAN, 1994, pp. 88-91.

[43] G. Lasota, *O sytuacji w literaturze dla młodzieży*, «Twórczość», n. 8, 1951, pp. 114-115.

Other signature features of the Stalinist education of the young generation, which served as standards for censors' assessment of Polish and foreign books to be published, also included the glorification of the communist-instituted state system, the censure of its domestic enemies, «anticlericalism, secularisation, atheism, [and] the promotion of scientific worldviews»[44].

Translations of Western literary works for children and young adults could be disseminated only if they conformed to thus-defined models, i.e., if they glorified members of the oppressed classes (proletariat, peasantry) or criticised members of the oppressing classes (bourgeoisie, aristocracy, clergy); if they extolled people's democracy or condemned capitalism, especially «Anglo-American imperialism»; if they spread atheist and rational worldviews and/or questioned faith in God and supernatural powers.

Consequently, positive assessments were first and foremost given to writers who focussed on the lives of poor people. One of those highly valued authors was Gianni Rodari, whose *Tale of Cipollino*[45] «warmly portrays the milieu of simple, poor, and exploited people who are nevertheless capable of standing up for themselves»[46], and whose short story *Journey of the Blue Arrow* «carries a considerable debunking load in its images of the life of proletariat families, especially children»[47]. French folk legends compiled by Paul Delarue and published as *The Love for Three Oranges* in 1953 were appreciated for their «praise of simple people's heroism and wisdom»[48] and praise of «the oppressed people»[49]. Victor Hugo was another cherished French author, and passages from his *Les Misérables* and *Toilers of the Sea* were recommended reads for children in People's Poland. As censors emphasised, Hugo revealed in them «the abysmal poverty of the French proletariat»[50].

Writers who criticised the oppressing classes or capitalism as such could also count on a nod from censors. One of them recognised Rodari's *Tale of Cipollino* as «a funny satire on the capitalist system, conveyed in a form that is accessible and understandable to children»[51]. *Przygody Gwoździka* [Adventures of a Tiny Nailman] by Marcello Argilli and Gabriella Parca was

[44] *Ibid*., p. 114.

[45] For works that have been translated into English, we provide only the English title in the body of the text (the original and Polish titles are given in footnotes). If, to our knowledge, a text has not been published in English, we cite the Polish title followed by our own English translation of it in square brackets.

[46] Review: G. Rodari, *Opowieść o Cebulku* (original title: *Il romanzo di Cipollino*), 23.06.1954.

[47] Review: G. Rodari, *Podróż błękitnej strzały* (original title: *Il viaggio della Freccia Azzurra*), 6.06.1955.

[48] Review: P. Delarue, *Miłość trzech pomarańczy* (original title: *L'amour des trois oranges*), 10.03.1953.

[49] Review: P. Delarue, *Miłość trzech pomarańczy* (original title: *L'amour des trois oranges*), 24.08.1953.

[50] Review: V. Hugo, *Kozeta* (original title: *Cosette*, an excerpt from *Les Misérables*), 28.06.1954.

[51] Review: G. Rodari, *Opowieść o Cebulku* (original title: *Il romanzo di Cipollino*), 23.06.1954.

acclaimed for «certain debunking overtones that provide shocking examples of the ruthlessness of the rich, policemen, and shocking images of children's destitution and suffering»[52]. A «considerable social value»[53] was also perceived in translations of French prose by Alphonse Daudet, who was praised for his «scathing criticism of his contemporary social order and particular ridicule of the urban bourgeoisie»[54], as well as for «exposing the core of colonisation aimed at the maximum exploitation of the conquered people»[55]. The lens of social critique was also applied to the reading of Alexandre Dumas's « sensation-and-adventure»[56] novels, which were described as playfully painting «the picture of then-France and its politics»[57] and «masterfully satirising its customs, society, particularly the clergy and royal officials»[58]. «A critique of the aristocracy»[59] was also discerned in the translation of Théophile Gautier's novel *Le Capitaine Fracasse*, although the censors pointed out that «its progressive appeal is considerably marred by the last chapters, in which […] the nobility and the king are patently eulogised»[60]. Jack London's *Opowieści z północy i południa* [Stories of the North and the South] were commended for their depictions of labour and struggles for survival and for denouncing «blood-thirsty plantation owners' criminal treatment of their Chinese workers»[61]. Censorship officials even spotted a satire on the capitalist social relationships in Hugh Lofting's Doctor Dolittle series[62].

Whenever the social resonance of texts deviated from the Marxist doctrine, they were bound to be criticised, if not directly negatively assessed, by censors. This is what happened to readers' favourite Jules Verne, who had enjoyed enormous popularity in inter-war Poland[63]. Functionaries of the new social order, who interpreted his books in terms of class struggle, were critical about

[52] Review: M. Argilli, G. Parca, *Przygody Gwoździka* (original title: *Le avventure di Chiodino*), 8.06.1955.

[53] Review: A. Daudet, *Listy z mojego młyna* (original title: *Lettres de mon moulin*), 30.08.1948.

[54] Review: A. Daudet, *Tartaren z Taraskonu* (original title: *Aventures prodigieuses de Tartarin de Tarascon*), 9.01.1954.

[55] *Ibid*.

[56] Review: A. Dumas, *Wicehrabia Bragelonne* (original title: *Le vicomte de Bragelonne*), 28.12.1950.

[57] Review: A. Dumas, *Trzej Muszkieterowie* (original title: *Les trois mousquetaires*), 13.04.1955.

[58] Review: A. Dumas, *Wicehrabia Bragelonne* (original title: *Le vicomte de Bragelonne*), 10.11.1950.

[59] Review: T. Gautier, *Kapitan Fracasse* (original title: *Le capitaine Fracasse*), 16.12.1952.

[60] *Ibid*.

[61] The review of the Polish translation of J. London's collection of stories, published as *Opowieści z północy i południa* in 1953, was analysed by Rogoż (p. 114).

[62] The review of the Polish translation of H. Lofting's *Doctor Dolittle's Circus*, published as *Cyrk doktora Dolittle* in 1950, was analysed by Rogoż (p. 113).

[63] See Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce: Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1918-2014)*, cit., pp. 165-167.

the writer's social consciousness, pejoratively identifying him as a «bourgeois»[64] with no understanding of several socio-political issues. The privileged class background of Verne's protagonists did not endear him to censors, as exemplified by the inclusion of «the social standing of the boys, students of an elitist school», among the flaws of *Two Years' Vacation*[65]. According to censors, Verne also failed to perceive the perniciousness of capitalism and its colonial policies, as spelled out by an official:

«A School for Crusoes» is interestingly written, but it oozes contempt and disregard for blacks and so-called colonial nations[66].

For the same reason, the other censors' assessment concludes on a thoroughly negative note:

A stupid and even stupefying, entirely ludicrous novel with a thoughtless theme. I can see no reason why paper should be wasted on a thing that does not go beyond a vulgar and inept copy of Robinson Crusoe. The few moments of fine satire on American businessmen, which take a fraction of the text, do not qualify it for publication[67].

Disdain for people of colour was cited as the reason for criticising Polish adaptations authored by Maria Julia Zaleska. Her rewritings of novels by James Fenimore Cooper and Richard Roth were accused by censors of «social faults», resulting from the presentation of Indians either as «cruel» and «delighting in tormenting Whites»[68] or as «meek idiots, terrified of one white person»[69]. A censor observed that such portrayals of members of other races instilled in readers

[…] the belief in the inferiority of the black race and in the mind-blowing brutality, villainy, and stupidity of Indian tribes. This belief is by no means diminished […] by expressions such as a «good Negro» or the sympathy of some (though not all) noble-minded characters for the suffering and humiliations of Negroes. This is a kind of sympathy we feel for a dog, without negating its absolute inferiority to humans[70].

References to religion, which was considered «the opium of the people», were also a liability. They were among the objections against two adaptations by Zaleska. The censor of *Młody wygnaniec* [A Young Exile] criticised «the atmosphere of the novel, in which God regulates all human matters, and people

64 Review: J. Verne, *Dwa lata wakacji* (original title: *Deux ans de vacances*), 8.11.1950.
65 *Ibid*.
66 Review: J. Verne, *Szkoła Robinsonów* (original title: *L'école des Robinsons*), 5.08.1950.
67 Review: J. Verne, *Szkoła Robinsonów* (original title: *L'école des Robinsons*), 29.07.1950.
68 Review: J.F. Cooper, *Mieszkaniec puszczy wg J.F. Coopera* (original title: *Leatherstocking Tales*), 5.08.1948.
69 Review: R. Roth, *Młody wygnaniec* (original title: unknown), no date.
70 *Ibid*.

are puppets put by God at good or bad places in the world and humbly suffering their lot»[71]. One of the censors assessing *Leatherstocking Tales* concluded ironically:

The words of Whites imply that their Christian origin is, so to speak, a warrant of their honesty and law-abidingness. A paltry and irrelevant argument[72].

References to religion also invited a critique of Selma Lagerlöf's novel *Marynia* [Mary], translated from Swedish[73].

Originally published in French, *The Curious Adventures of a Field Cricket* by the Belgian naturalist Ernest Candèze was charged with failing to embody a science-informed worldview. Framed as a diary of the eponymous insect, the text provoked a censor to comment the following:

Its serious defect is […] its non-Marxist take on the issue through an unduly unnatural personification of the cricket, which in this way indulges in overly sentimental slobbering over its purported spiritual experiences. Our Marxist approach to nature should be simpler, without futile psychologising on the basis of an insect's spiritual experiences[74].

4.2 *Pedagogical criteria*

Besides the criteria rooted in the Marxist-Leninist ideology, censors' reviews also use benchmarks defined by the didactic value of the books under assessment, which is puzzling insofar as there is no evidence suggesting that censors recruited in the Stalinist period had any background in education[75].

It was a commonly accepted idea that publications for children and young adults should avoid cruelty, given the tender age of the readership. This was another reason why Candèze's *Field Cricket* was severely rebuked:

Besides the scientific reasons, the gravest fault of the book, a fault that makes it unpublishable, lies in macabre descriptions of hunting, ambushes, insects devouring each other, luring their prey, and reproducing, which work all the more subjectively since the devoured preys are endowed with human feelings, intelligence, and the consciousness of their fate […].

71 Review: R. Roth, *Młody wygnaniec* (original title: unknown), no date.

72 Review: J.F. Cooper, *Mieszkaniec puszczy wg J.F. Cooper* (original title: *Leatherstocking Tales*), 5.08.1948.

73 The review of the Polish translation of S. Lagerlöf's book published as *Marynia* in 1949 was analysed by Rogoż (p. 113).

74 Review: E. Candèze, *Przygody* świerszcza (original title: *Aventures d'un grillon*), 7.12.1949.

75 See e.g. Kamińska-Chełminiak, *Cenzura w Polsce 1944-1960. Organizacja, kadry, metody pracy*, cit., pp. 57-73, 109-118. Kamińska-Chełminiak explains: «According to the data of the COCPPP, as of 1 June 1948, the COCPPP employed 128 censors (plus administration and maintenance personnel), 17 of whom (13%) were university graduates. […] In the following years, this proportion dropped» (p. 64).

Having read this book, children would remain unmoved by any depiction of the hellhole of Auschwitz[76].

The «overtones of cruelty and sadism»[77] and «formulations […] that fill children with horror»[78] (e.g. episodes of burning alive, cannibalism, and slaughtering of animals) were also a reason for disparaging the French folk legends collected by Delarue. A censor concluded that «Scenes of cannibalism and brutality are not a recommendable read for children»[79], and another one insisted that the book be modified: «I believe that all formulations of this kind in this collection that fill children with horror should be revised»[80].

Pointless cruelty was also cited by a censor as a serious deficiency of *Młody wygnaniec*:

For various reasons, episodes of sophisticated cruelty against people and thoughtless, sometimes unmotivated ones against animals harm children's imaginations, which are already all too saturated with experienced and heard-of brutality[81].

Further in her review, the functionary proposes a series of modifications to correct the book in this respect. For example, in the episode in which a servant shoots a squirrel off a branch at the protagonist's command to prove his shooting skills, the censor replaces the animal with the branch as the shooter's target.

The opposite of cruelty, «humanitarianism, love for people, and goodness»[82] were applauded in a story extracted from *Heart* by De Amicis, though the same censor did not fail to notice its «somewhat exaggerated, tearful lyricism»[83].

Diction in books that was too colloquial or profane for a young readership also could be, and indeed was, disapproved by censors. For example, the translation of the volume of French folk legends, *The Love for Three Oranges*, was chided for its «pedestrian moments»[84] – which is how the censor referred to the use of colloquial vocabulary, which included *rascal*, *muzzle*, *buttocks*, and *humbug*.

[76] Review: E. Candèze, *Przygody* świerszcza (original title: *Aventures d'un grillon*), 21.11.1950.

[77] Review: P. Delarue, *Miłość trzech pomarańcz* (original title: *L'amour des trois oranges*), 4.03.1953.

[78] *Ibid*.

[79] *Ibid*.

[80] Review: P. Delarue, *Miłość trzech pomarańcz* (original title: *L'amour des trois oranges*), 10.03.1953.

[81] *Ibid*.

[82] Review: E. De Amicis, *Przy* łożu *taty* (original title: *Infermiere di Tata*), 15.02.1954.

[83] *Ibid*.

[84] Review: P. Delarue, *Miłość trzech pomarańcz* (original title: *L'amour des trois oranges*), 4.03.1953.

Censors sometimes credited the educational, pedagogical, or didactic value of the works they assessed. Such value was recognised in texts highlighting desirable traits, such as industriousness or affection for one's parents, which are foregrounded in two reviews of the Polish translation of Carlo Collodi's *Pinocchio*:

> The puppet's fantastic adventures are underpinned by a sound and useful idea that study and labour are necessary because it is only through them that a wooden marionette can transform into a real human being[85].

> It instils in children an attachment to parents and the belief that parents will do anything in their power for their children and for their good […][86].

Nevertheless, censors as a rule did not specify what the appreciated pedagogical merit of the text resulted from. This is exemplified by Polish translations of De Amicis's stories *The Sardinian Drummer-Boy* and *Daddy's Nurse*. The former was laconically assessed by an official as «A well-known story of considerable educational value. No objections»[87]; the latter was deemed by another censor to boast «positive educational aspects»[88].

Equally positive – and equally curt – evaluations were given to translations of works by two contemporary French authors, Pierre Gamarra and Michel Rouzé. Rouzé's *The Forest of Quokelunde* was recognised for its «considerable educational appeal, which is skilfully distributed, without dummy oversimplifications»[89], and Gamarra's *Zaczarowane wyrazy* [Enchanted Words] was assessed as «instructive»[90]. The same vague criterion drove the negative appraisal of Robert Louis Stevenson's *The Treasure Island*, which, as a censor opined, had «no educational elements»[91].

4.3 *Literary criteria*

Although the censorship office by definition valued graduates of humanities departments with sound knowledge of history and literature, the staffing realities diverged from such expectations:

85 Review: C. Collodi, *Pinokio* (original title: *Le avventure di Pinocchio*), 14.02.1949.
86 Review: C. Collodi, *Pinokio* (original title: *Le avventure di Pinocchio*), 11.11.1954.
87 Review: E. De Amicis, *O sardyńskim doboszu* (original title: *Il tamburino sardo*), 11.08.1954.
88 *Ibid.*
89 Review: M. Rouzé, *W zatopionym lesie* (original title: *La forêt de Quokelunde*), 11.05.1956.
90 Review: P. Gamarra, *Zaczarowane wyrazy* (original title: *Les mots enchantés*), 29.11.1954.
91 Review of the Polish translation of R.L. Stevenson's *Treasure Island* published in 1950 was analysed by Rogoż (p. 113).

[…] in the 1940s and '50s, most employed censors were uneducated and lacked elementary knowledge of history, literature, and even spelling. […] They were mostly social upstarts whose greatest assets were party membership and principled ideological stance[92].

This is probably one reason why assessments of translated children's and young-adult books from behind the Iron Curtain relatively seldom refer to strictly literary criteria. If such considerations are mentioned at all, they are usually superficial and schematic, as illustrated by the review of Rodari's *Blue Arrow*:

The book is very interestingly written. Multiple adventures of the novel's protagonists make the action lively, diversified, […] which in turn makes the book a page-turner. […] Lively action, vivid narrative course, simple language which does not impede reading […][93].

Officials' literary judgments are sometimes, as Marta Fik puts it, «extremely primitive»[94]. For example, the censor of *Field Cricket*, who in all likelihood was not acquainted with notions such as *anthropomorphism* or *personification*, struggled to explain the key stylistic device of the text:

The theme is rendered so that the cricket is a «pseudo» human, that is, it thinks, reasons, feels, concludes, loves, hates, despises, etc. the way people do[95].

The reviews we have studied outline the type of children's and young-adult literature which was preferred by the regime. One of its prized features was availability, in the sense of theme selection and the use of simple language that was readily understandable to young readers. For example, an official described the Polish adaptation of *Winnie the Pooh* as «stylistically adjusted to children's mental capacities»[96], and a collection of wildlife stories by Jean-Henri Fabre was considered «an intelligibly and interestingly written book about the life of some insects»[97].

Censors also often quoted features such as dynamism and humour. Their reviews repeatedly use the modifiers *lively* and *quickly progressing* (meant as praise) and a set of phrases concerning the comic load:

The fairy tale is lively, colourful, and full of humour. It has quickly progressing action[98].

92 Kamińska-Chełminiak, *Cenzura w Polsce 1944-1960. Organizacja, kadry, metody pracy*, cit., p. 116.

93 Review: G. Rodari, *Podróż błękitnej strzały* (original title: *Il viaggio della Freccia Azzurra*), 13.08.1955.

94 Fik, *Cenzor jako współautor*, cit., p. 133.

95 Review: E. Candèze, *Przygody* świerszcza (original title: *Aventures d'un grillon*), 7.12.1949.

96 Review: A.A. Milne, *Kubuś Puchatek* (original title: *Winnie the Pooh*), 8.07.1955.

97 Review: J.-H. Fabre, *Służba zdrowia w* świecie *owadów* (original title: excerpts from *Souvenirs entomologiques*), 20.01.1949.

98 Review: M. Argilli, G. Parca, *Przygody Gwoździka* (original title: *Le avventure di Chiodino*), 8.06.1955.

The fairy tale is lively and beautifully written[99].
[…] lively, engaging language[100].
[…] a witty and funny tale[101].

Long descriptions were regarded as a defect, though some censors appreciated their literary quality. This divergence is well captured by two reviews of the same novel by Hugo, one of them lauding while the other reproving its depictions of nature:

Among the downsides, there are […] sometimes long-winded and tedious passages[102].
Superb, though rather fantastic, descriptions of nature, the sea, and a sea-storm deserve credit[103].

Remarks implying that censors were aware of the translators' mediation and their impact on the form of books under assessment are rather rare in censorial reviews. They are mostly limited to noting the high quality of the translation, as viewed by the censor («beautifully translated»[104], «very beautiful translation»[105], «perfect […] translation»[106], «very good translation»[107]). Such observations occasionally come with justifications:

Rogosz's perfect translation faithfully renders the linguistic subtleties and the specific atmosphere of France's works[108].

Only sporadically did censors include detailed insights in their reviews, for example commenting on the translator's notes or the translation of the title or the protagonist's name:

The title is inaccurately translated. The original reads *Vingt mille lieues sous les mers*, i.e., «20.000 French miles under the seas», which amounts to (over) 80.000 km[109].

99 Review: G. Rodari, *Podróż błękitnej strzały* (original title: *Il viaggio della Freccia Azzurra*), 06.1955.
100 Review: C. Collodi, *Pinokio* (original title: *Le avventure di Pinocchio*), 11.11.1954.
101 Review: E. Candèze, *Przygody* świerszcza (original title: *Aventures d'un grillon*), 14.11.1949.
102 Review: V. Hugo, *Wyprawa Gilliatta* (original title: *Gilliatt le Malin*, an excerpt from *Les Travailleurs de la mer*), 10.01.1953.
103 *Ibid*.
104 Review: C. Collodi, *Pinokio* (original title: *Le avventure di Pinocchio*), 14.02.1949.
105 Review: E. De Amicis, *Przy* łożu *taty* (original title: *Infermiere di Tata*), 15.02.1954.
106 Review: E. Candèze, *Przygody* świerszcza (original title: *Aventures d'un grillon*), 21.11.1950.
107 Review: A. Dumas, *Wicehrabia Bragelonne* (original title: *Le vicomte de Bragelonne*), 10.10.1950.
108 Review: A. France, *Zazulka* (original title: *L'abeille*), 10.07.1950.
109 Review: J. Verne, *20.000 mil podmorskiej* żeglugi (original title: *Vingt mille lieues sous les mers*), 25.08.1950.

Conclusion

In the first post-war decade, children's and young-adult literature in People's Poland became strictly subordinated to the demands of social realism and the ethos of building the new system. The officials of the Ministry of Culture and Art sought to develop from scratch a new, «progressive» (as the buzzword had it back then) literary repertoire, and the troops of censors tirelessly worked on assessing books to be published. Given the dearth of Polish books (which were yet to be written), publishers submitted foreign works to censors in an attempt to fill the gap on the war-ravaged book-selling market.

The censorship office staff carefully scrutinised the themes and issues addressed in books and examined how deeply the works were permeated by «an atmosphere of ideological zeal»[110]. Kamila Budrowska stresses that, in this respect, translated books from behind the Iron Curtain were inspected with more alertness than mass-imported literature from the USSR. Censors meticulously combed texts for the undesirable «descriptions of compelling adventures and artificial excitements characteristic of books from capitalist countries»[111], as one functionary put it.

Censorial reviews of Polish translations of Western children's and young-adult literature published in People's Poland under Stalinism contain clues as to why some books were included, albeit conditionally sometimes, in the new literary repertoire. Similarly to Polish books and imports from the Eastern Bloc countries, they were assessed by censors first and foremost in terms of their ideological and political appeal, with pedagogical and literary criteria only serving an auxiliary function. Censors' assessments had two interlaced objectives: control, which involved censuring aspects deviating from the projected world order, and propaganda, which promoted what the system deemed to be valuable content[112].

Among the censorial reviews that we have explored, the straightforwardly negative assessments are few and far between. One reason for this may be that editors at publishing houses were perfectly aware of the regulations and recommendations in place and submitted only those texts that aligned with the trumpeted worldview, thereby being able to count on censors' approval. Consequently, they chose primarily works by writers who declared their allegiance to or support for communism[113] and texts that had been released in

110 Z. Jarosiński, *Nadwiślański socrealizm*, Warszawa, IBL PAN, 1999, p. 277.

111 From a censorial review of B. Ostromęcki's novel *Domy nad Wisłą* [Houses on the Vistula], qtd. in Budrowska, *Literatura i pisarze wobec cenzury PRL 1948-1958*, cit., p. 219.

112 Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach cenzury*, cit., p. 120.

113 For example, Rodari and Argilli. See Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, cit., pp. 142-179.

the West by publishers endorsing the communist ideology[114]. In addition, they proposed 19th-century classics of children's and young-adult literature, which censors usually allowed to be published, though sometimes not without pointing out their shortcomings (e.g. a lack of didactic value in Verne's works)[115]. Translations of Western texts were occasionally printed regardless, even if they were negatively assessed by censors, since publishers had to meet pre-defined publication targets, and the COCPPP did not dare to explicitly question the release[116].

In the Stalinist period, cultural policies defined children's and young-adult literature as an important factor in education, one that was envisaged to support parents, schools, and children's organisations. Works for children and young adults were supposed to «move, teach, and educate, not only through their content, but also through their form»[117]. The agenda of the new authorities was primarily implemented through magazines and textbooks, but also through mandatory school readings[118]. Fortunately for young readers, the book market was more difficult to manage than expected. That is why, despite the concerted efforts of the regime in Poland, young Poles had an opportunity to read texts published in the West, even though their offerings were not very diversified due to the dual-selection mechanism, including self-censorship at publishing houses and centrally-instituted censorship proper.

114 Among the preferred publishers were Hier et Aujourd'hui (founded by the French Communist Party in 1941 and later included in Éditeurs Français Réunis) and La Farandole (a sympathiser of the French Communist Party). See Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce*, cit., pp. 250-251.

115 See also e.g. Budrowska, *Literatura i pisarze wobec cenzury PRL 1948-1958*, cit., pp. 217-218.

116 *Ibid*., p. 219.

117 From the censorial cultural policy document, AAN, GUKPPiW, I/420, file 165/4, sheet 272, qtd. in Budrowska, *Literatura i pisarze wobec cenzury PRL 1948-1958*, cit., p. 226.

118 Jarosiński, *Nadwiślański socrealizm*, cit., pp. 277-278.

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Dutch-language children's literature in Polish translation: 200 years of relations between the peripheries

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ABSTRACT: Polish translations of children's literature from the Netherlands and Flanders are only about 100 books in more than 200 years. This small corpus provides an opportunity to trace the literary transfer from peripheries to peripheries: the countries of the Dutch-speaking cultural area and Poland. In the analyses of inequalities within world literature much less attention is paid to the relations between peripheries than to the more obvious, unequal relations between periphery and centre. This paper adopts a historical perspective to present the change in the relations between peripheries and in the role of the centre: German, French, and English as intermediaries. It also discusses the factors which have contributed to the circumventing of mediation by the centre, alongside the factors which play an important role in the cultural transfer of children's literature from the Netherlands and Flanders to Poland. The theoretical framework of the analysis is provided by the sociology of translation and the studies of the international circulation of literature from the Low Countries.

EET/TEE KEYWORDS: Dutch and Flemish children's literature; Polish translation; Cultural transfer; Sociology of translation; Periphery-periphery relations; XXth-XXIst Centuries.

Introduction

The history of Polish translations of Dutch literature commences with the Journal of Bontekoe, which was published in Breslau/Wrocław in 1805. This publication bears relevance to the thematic concerns of this study in more than one way. Firstly, since Bontekoe's Journal was defined by the Polish publisher as a text for a young readership, it has come to be counted among children's and young adult literature in the target culture. Consequently, it is not only the first book which made its way from the Netherlands to the Polish literary system,

but also the first Dutch book for young adults translated into Polish. Secondly, the text was translated via German, rather than directly from Dutch. Thirdly, the literary version of a 17th century ship log produced in the service of the United East India Company (Vereenigde Oostindische Compagnie, VOC) is a vehicle of Dutch culture since the VOC powerfully influenced the economy and culture of the Netherlands and this impact continued long after the company itself was disbanded. Thus, in this case, the cultural transfer between peripheries occurred via literature and was mediated by the centre, for this was the status of the German language and culture vis-à-vis both – Polish and Dutch – peripheral cultures in the 19th century.

In this article, I will outline the presence of Dutch children's and young adult literature in the Polish system of this literature, starting with the Journal of Bontekoe and ending with translations published by the end of 2019. I will focus on the role that the languages and cultures which are regarded as central – German, French and English – have had and still have in these relations. I will therefore attempt to define the function of these centres in the from-periphery-to-periphery transfer from the perspective of the receiving culture. As aptly observed by Gillis Dorleijn[1], grasping the image of the world to which the transfer takes place is useful in the study of cultural transfer at the level of the target culture, because it helps explain the distinctiveness of this transfer and its character. Given this, my discussion of respective timeframes will sketch the contexts in which translations of Dutch children's and young adult literature made their way to the receiving culture. Research on the international circulation of Dutch literature[2] indicates that despite progressing globalisation and a growing international openness of cultures to each other, national factors still play a germane role, particularly in the reception of literature and its nationally anchored frames. With this insight in mind, I assume that the national perspective will affect the processes of acculturation involving Dutch-language children's literature in Poland. For this reason, I will closely examine local mechanisms, institutions, actors and networks. I will rely on the cultural-sociological approach (sociology of translation) as the major theoretical framework for my argument[3].

[1] G. Dorleijn, *Studying the Circulation of Dutch Literature: Some Considerations*, in E. Brems, O. Rétheley, T. van Kalmthout (edd.), *Doing Double Dutch*, Leuven, Leuven University Press, 2017, p. 37.

[2] Brems, Rétheley, van Kalmthout (edd.), *Doing Double Dutch*, cit.

[3] J. Heilbron, G. Sapiro, *Outline For a Sociology of Translation: Current Issues and Future Prospects*, in M. Wolf, A. Fukari (edd.), *Constructing a Sociology of Translation*, Amsterdam, Philadelphia, John Benjamins Publishing Company, 2007.

1. *Centres and peripheries in the* world republic of letters

The sociology of translation is rooted in the polysystem theory and the theory of the literary world-system, which can be traced back to the notion of *Weltliteratur*, as used by Goethe in his journal «Über Kunst und Altertum» (1816-1932) from 1827 on[4]. In the 21st century, the theory of the literary world-system gained wide currency owing to Pascale Casanova's seminal *La republique mondiale des lettres* (1999), in which she scrutinised the impact of French literature as the centre on world literature. Her theory of the literary world-system holds that the distribution of cultural power among central, semi-peripheral and peripheral areas is unequal and hinges on three types of power relations: political, economic and cultural. Referring to the *world republic of letters*, Franco Moretti argues that literature should be understood not through reading particular texts but through compiling and exploring huge amounts of data, i.e. through «distant reading»[5]. Both authors adopted the Europe-centric perspective, in which French, German and English cultures are regarded as dominant. Both Casanova and Moretti have been criticised for their excessive focus on the centre, which – within this approach – was supposed to «irradiate» peripheral areas, framed as merely importing the production of the centre[6]. The function that these theories assign to literary peripheries in relation to the centre is, at most, that of response.

Researchers affiliated with Culture Transfer Studies and the sociology of translation tend to devote their attention to the transfers from or to the centre, while relationships among peripheries still remain grievously underexamined. Theo D'haen insists that multiculturalism and postcolonial approaches have additionally redirected US scholars' interest towards other 'grand' world literatures, such as Chinese, Japanese, Arabic and multiple Indian literatures, which has further contributed to the peripheralisation of minor European literatures[7]. Research on cultural transfer involving Dutch literature has also mainly scrutinised barriers and obstacles which this small literature has to surmount to meander its way to the centre[8]. Studies on the circulation of Dutch

[4] The development of the notion has been discussed by T. D'haen in *The Routledge Concise History of World Literature*, New York, Routledge, 2012. For source texts by leading scholars, such as J.W. Goethe, K. Marx, F. Engels, D. Damrosch, G. Chakravorty Spivak, P. Casanova and M. Kundera, see e.g. T. D'haen, C. Domínguez, M. Rosendahl Thomsen (edd.), *World Literature: A Reader*, New York, Routledge, 2013.

[5] F. Moretti, *Conjectures on World Literature*, «New Left Review», vol. 54, n. 1, 2000, pp. 54-68 <https://newleftreview.org/issues/II1/articles/franco-moretti-conjectures-on-world-literature> (last access: 31.01.2020).

[6] For a survey of criticism of the two authors' theoretical assumptions, see D'haen, *The Routledge Concise History of World Literature*, cit., pp. 101-113.

[7] D'haen, *The Routledge Concise History of World Literature*, cit., p. 153.

[8] The title of N. Wilterdink's article *Breaching the Dyke. The International Reception of Contemporary Dutch Translated Literature* sounds symptomatic in this context. Wilterdink studies

literature in the global circuit devote somewhat more attention to relations among peripheries[9]. Nevertheless, children's and young adult literature only sporadically features as the major object of reflection both in earlier and in recent research[10], even though Dutch-language writers of books for children and young adults account for a considerable proportion of all translated Dutch authors, as reported by Johan Heilbron and Nicky van Es[11]. More than half (twenty-two) of the forty Dutch authors most frequently translated into all languages since the mid-1960s are writers for children and young adults[12]. Children's and young adult literature is thus an important site of the formation of intercultural relations.

As related by Heilbron and Gisèle Sapiro[13], English currently occupies the hyper-central position in the literary world-system. This position is defined, among others, based on the proportion of books translated from a given language on the international market of translations. At present, more than half of translated books worldwide are translated from English. Translations from German and French, i.e. other languages recognised as central, make up about 10-12% of the global translation market. Semi-peripheral positions are occupied by languages translations from which amount to 1-3% of the worldwide market of translations (e.g. Spanish and Italian). All the remaining languages are regarded as peripheral. The proportion of translated literature on respective national literature markets provides another criterion which confirms this hierarchy. Countries which take central places in the world economy rarely rely on foreign models. The reverse is true for small countries, which are less important economic players, which observe the developments unfolding at the centres and imitate their models. As reported by Heilbron[14], in the latter half

the reception of Dutch literature in countries classified as central, such as Germany, France, Britain and the United States.

9 Brems, Rétheley, van Kalmthout (edd.), *Doing Double Dutch*, cit.; T. D'haen (ed.), *Dutch and Flemish Literature as World Literature*, London, Bloomsbury Academic, 2019.

10 H. Van Uffelen, *Moderne niederländische Literatur im deutschen Sprachraum 1830-1990*, Münster, Zentrum für Niederlande-Studien, 1993; I. Wikén Bonde, *Was hat uns dieser Gast wohl zu erzählen? oder Die Jagd nach dem Nobelpreis. Zur Rezeption niederländischer Literatur in Schweden*, Stockholm, Almqvist & Wiksell International, 1997; J. Heilbron, N. van Es, *In de wereldrepubliek der letteren*, in T. Bevers, B. Colenbrander, J. Heilbron, N. Wilterdink (edd.), *Nederlandse kunst in de wereld. Literatuur, architectuur en beeldende kunst 1980-2013*, Nijmegen, Vantilt, 2015, pp. 20-54; Ch. Hermann, *The Flemish Lion: Oscillating between Past and Present: Ideology in German-Language Adaptations of Conscience's De Leeuw van Vlaenderen for Young Readers*, in Brems, Rétheley, van Kalmthout (edd.), *Doing Double Dutch*, cit., pp. 209-225; J. Van Coillie, I.B. Kalla, *Minoes, Minnie, Minu en andere katse streken. De internationale receptie van Annie M.G. Schmidts Minoes*, Gent, Academia Press, 2017.

11 Heilbron, van Es, *In de wereldrepubliek der letteren*, cit., p. 32.

12 *Ibid*., p. 40; 42-43. Nine of these twenty-two authors have also been traslated into Polish: Dick Bruna, Anne Frank, Anne de Vries, An Rutgers van der Loeff, Wil Huygen, Max Velthuijs, Annie M.G. Schmidt, Jan Terlouw and Tonke Dragt.

13 Heilbron, Sapiro, *Outline For a Sociology of Translation*, cit., p. 95.

14 J. Heilbron, *Nederlandse vertalingen wereldwijd. Kleine landen en culturele mondialisering*,

of the 20th century, translated literature accounted for less than 5% of the local book markets in the central states, such as the UK and the US; for 10-12% in France and Germany, and for about 15% in Italy, while an increase from 12% in 1965 to over 20% in 1985 was recorded in Spain. Translations make up about 25% of the book market in peripheral and semi-peripheral countries, such as the Netherlands and Sweden. In Poland, the proportion of translations on the national book market oscillated around the similar level of 20%-28% throughout the 20th century[15].

However, English-language literature was not always central to the world republic of letters. Until the 18th century, the role of French was paramount, only to be overshadowed by German and English. Until the early 20th century, French was the language of international diplomacy, while German became the language of scholarship and culture and English first prevailed in the economy[16], subsequently coming to comprehensively dominate in all spheres of international communication by the 21st century. Weaving their way to one of the central cultures via translation has been, and often still is, a first step that peripheral literatures must and do take in order to trickle into other peripheral cultures as well[17]. However, the symbolic and economic value of translation in the literary world-system does not depend exclusively on the position a given language takes in this system, with the status of an author, a translator and/or a publisher being another important factor. Heilbron and Sapiro emphasise that the space of the receiving culture is determined by political and economic forces, as well as being dependent on the operations of its institutions[18]. Because political, economic and social conditions in Poland have evidently been changing since 1805 till the present day, I will examine Polish translations of Dutch literature in four timeframes: 1805-1945, mainly impacted by France and Germany; 1946-1980, when Polish culture was hermetic as a result of the communist governance; 1981-1999, a time of the political and economic transition; and 2000-2019, marked by globalisation and the spread of new communication systems.

in J. Heilbron, W. de Nooy, W. Tichelaar (edd.), *Waarin een klein land. Nederlandse cultuur in internationaal verband*, Amsterdam, Prometheus, 1995, p. 209.

15 N. Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1918-2014)*, Kraków, Universitas, 2018, pp. 163-164, 230.

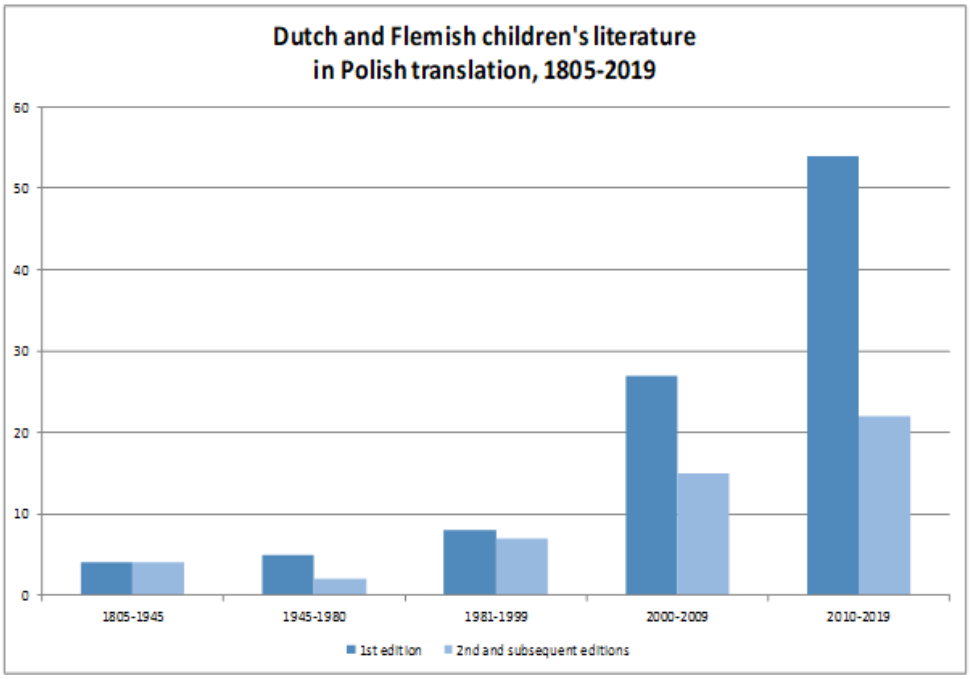
16 Heilbron, *Nederlandse vertalingen wereldwijd*, cit., p. 214.

17 Heilbron, Sapiro, *Outline For a Sociology of Translation*, cit., p. 96; Heilbron, van Es, *In de wereldrepubliek der letteren*, cit., pp. 42-43.

18 Heilbron, Sapiro, *Outline For a Sociology of Translation*, cit., p. 103.

2. *Dutch and Flemish children's literature in Polish translation: facts and figures*

Between 1805 and 2019, a total of ninety-eight Dutch-language books for children and young adults were translated into Polish[19]. Six of them appeared in two different translations: *Het achterhuis* by Anne Frank[20] and five parts of *Jip en Janneke* by Annie M.G. Schmidt[21]. Sixteen translations were subsequently re-published.



Pic. 1. Dutch and Flemish children's literature in Polish translation, 1805-2019

[19] All the statistics in this paragraph are cited on the basis of bibliographies included in J. Koch. *Książka niderlandzka w przekładzie polskim. Katalog wystawy w bibliotece Zakładu Narodowego Im. Ossolińskich. Wroclaw 12-28 maja 1993*, Kłodzko, Witryna Artystów, 1993; K. Biernacka-Licznar, E. Jamróz-Stolarska, N. Paprocka, *Lilipucia rewolucja. Awangardowe wydawnictwa dla dzieci i młodzieży w Polsce. Produkcja wydawnicza. Bibliografia*, Warszawa, Stowarzyszenie Bibliotekarzy Polskich, 2018; the translation database of the Dutch Foundation for Literature: <https://letterenfonds.secure.force.com/vertalingendatabase/zoeken> (last access: 14.02.2020); and this author's own research.

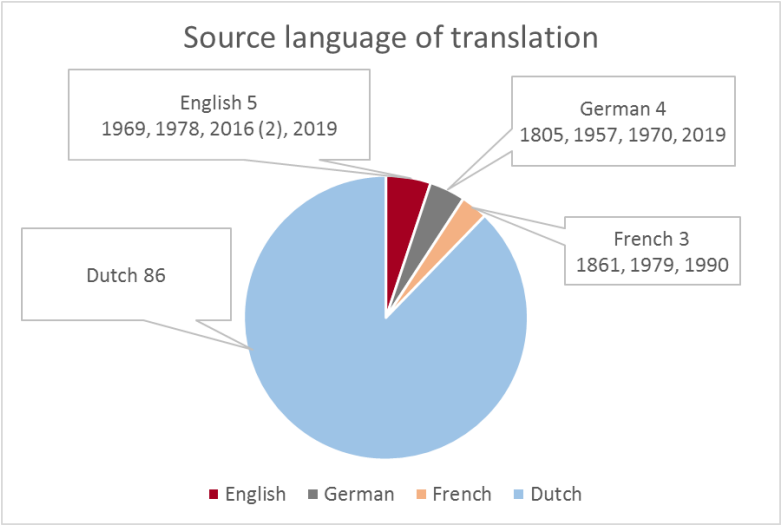
[20] In 1957 translated from German by Zofia Jaremko-Pytowska; in 1993 translated from Dutch by Alicja Oczko.

[21] The first translation from Dutch, entitled *Julek i Julka*, was authored by Joanna Borycka-Zakrzewska (Part 1) and Łukasz Żebrowski (Parts 2-5) and published by Hokus-Pokus (2004-2009). The second edition, entitled *Jaś i Janeczka*, was translated by Maja Porczyńska-Szarapa and published by Dwie Siostry in 2018.

Most of these titles were directly translated from Dutch, five from English, four from German and three from French. Until the 1980s, translations were predominantly indirect, i.e. mediated by German (3), French (2) and English (2), with only occasional direct translations from Dutch (2). An observable change came in the 1980s, when the first cohort of Polish students of Dutch graduated from universities in Warsaw and Wrocław. Dutch Studies started developing in Poland as an academic field in the 1960s, and the early curricula accorded literature a very prominent place. Ever since, translators of Dutch literature have been mainly graduates of Dutch Studies, boasting not only a command of the Dutch language but also a substantial expertise in Dutch literature. They have become important intermediaries and have influenced editorial decisions of publishers. Consequently, since the 1980s, an overwhelming majority of Polish translations of Dutch literature have been made directly from Dutch. This has also been true of children's and young adult literature, in which merely five of the total of eighty-four titles published between 1980 and 2019 were translated from languages other than Dutch, wherein only three were indirect translations (one apiece from French, German and English). The indirect translations were mainly driven by market-related economic reasons, as translations from central languages are cheaper than those from peripheral ones in Poland due to the greater number of translators of the former. Besides, all three cases of indirect translation involved potential bestsellers, with the production time and costs conceivably playing an essential role. Two other translations were made directly from English, because the Dutch writer Marieke Nijkamp originally wrote the books in English. Her choice represents the practice of authors stemming from small language communities who decide to write in one of bigger or central languages[22]. Their decisions may be prompted by a range of motives, including political (e.g. political emigration) and economic (a larger reading public entails bigger sales and lower translation costs) considerations, or they result, as highlighted by Heilbron and Sapiro[23], from efforts to accumulate symbolic capital (recognition in one of the central cultures often paves one's way to other cultures).

[22] See A.-R. Delbart, *Etre bilingue et écrivain français: les motivations du choix d'une langue d'écriture*, «Bulletin VALS-ASLA (Association suisse de linguistique appliquée)», vol. 76, 2002, pp. 161-178.

[23] Heilbron, Sapiro, *Outline For a Sociology of Translation*, cit.



Pic. 2. Translations of Dutch-language children's and young adult literature in terms of the source language

Children's and young adult literature is more and more numerously represented in Polish translations of Dutch literature as such. This is evidently seen by comparing the statistics from the database of the Dutch Foundation for Literature:

period	literature for adults	children's and young adult literature
1981-1990	46	4
1991-2000	47	4
2001-2010	87	29
2011-2019	117	41

Although the database of the Dutch Foundation for Literature is incomplete, the available figures render a tolerably reliable image of a general tendency of increase both in the overall volume of translations from Dutch and in the percentage of children's and young adults' books among these titles. While between the 1980s and 2000, this proportion stood at about 10%, since 2000, Dutch children's and young adults' fiction has come to account for over 30% of all the Polish translations of Dutch literature. A similar trend has also been registered in other peripheral areas. In Sweden, translations of Dutch children's literature have accounted for more than half of all Swedish translations from Dutch literature since the 1950s; however, about one-fifth of these are comic books[24], while this genre only rarely appears among Polish translations.

[24] Wikén Bonde, *Was hat uns dieser Gast wohl zu erzählen?*, cit., p. 297.

3. *1805-1945: classics adapted for young adults: Germany and France as centres*

Just two translations of Dutch children's and young adults literature appeared in Polish in the 19th century. One of them was the already mentioned Journal of Bontekoe, included in an anthology for the young people which garnered such popularity that the Wrocław-based publisher Wilhelm Gottlieb Korn released its second edition in 1808. The other was a two-volume collection of novels of manners by Hendrik Conscience, which also had two editions, with only the second edition (1861) explicitly defining young adults as the target readership in its title *Wieczory zimowe, obrazy z życia rodzinnego dla młodych osób* [Winter nights: Images of family life for young people][25].

Although neither Bontekoe's Journal nor Conscience's novels were originally meant to be perused by a young reading public, the Polish subtitles of both works indicate that they are specifically addressed to adolescents. Both texts were adapted to the Polish cultural context. For example, Franciszek Salezy Dmochowski, who translated Conscience, not only relocated the action of *Wat eene moeder lijden kan* from Antwerp to Warsaw and gave its characters typically Polish names, but also re-worked the ending of the novel to imbue the originally ambiguous conclusion with a far more optimistic ring. According to Marcin Lipnicki[26], these acculturation processes dovetailed with general European tendencies in 19th century translation. At the same time, these changes (naturalisation, cultural context adaptation) epitomise translation strategies specific to children's and young adult literature. Göte Klingberg explains that children's literature is written and translated «with a special regard to the (supposed) interests, needs, reactions, knowledge, reading ability and so on of the intended readers»[27], and Cecilia Alvstad lists «cultural context adaptation» as the most frequently reported feature of translated children's literature[28]. Lipnicki's discussion of the translation of Conscience passes over the fact that it was included in a collection dedicated to «young people», which in all probability affected the translation strategy. For his part, Jerzy Koch argues[29] that modifications in the text of the Journal of Bontekoe (cuts, abridgements and summaries, the re-sequencing of episodes, etc.) are attributable to the

[25] The first edition appeared in 1858 with a slightly different title: *Powieści belgijskie z życia rodzinnego*. The title of this collection did not explicitly define young people as its target audience.

[26] M. Lipnicki, *Wat eene moeder lijden kan door Hendrik Conscience in het Pools. Vertaling of adaptatie?*, «Neerlandica Wratislaviensia», vol. 27, 2017, p. 137.

[27] G. Klingberg, *Children's Fiction in the Hands of the Translators*, Malmö, Liber/Gleerup, 1986, p. 11.

[28] C. Alvstad, *Children's Lliterature and Translation*, in Y. Gambier, L. van Doorslaer, *Handbook of Translation Studies*, Amsterdam, Philadelphia, John Benjamins Publishing Company, 2010, Vol. 1, p. 22.

[29] J. Koch, *Bontekoe läuft in Breslau/Wrocław ein*, in *Auf den Spuren der Niederländer zwischen Berlin und Warschau*, Berlin, Deutsch-Niederländische Gesellschaft, 1997, p. 125.

educational background of Joachim Campe, the German editor of the book, whose edition of 1788 served as the source text for the Polish translation. The point being that pedagogy at the time was governed by the *utile dulci miscere* principle, which was likely amplified by the fact that both the German and the Polish publications targeted a young readership.

Only two more children's and young adults' books translated from Dutch were published in Polish in the first half of the 20th century. One of them was also an adaptation. In 1904, F.L. Lubodziecka translated *De kleine Johannes* (1887), a classic novel by the Dutch symbolist, Frederik van Eeden. This translation served Maria Szafirowa as the basis for *Mały Janek. Opowiadanie dla dzieci* [Young Johnny: A Tale for Children], an adaptation intended for child readers which appeared in 1913[30]. The other book was *Karin i Lila* (1938) (*Tegen den stroom op*, 1917), a novel for girls by Jo van Ammers-Küller, who produced bestselling fiction for the female reading public in the interwar period, with nearly all of her books translated into German and Polish and some into Hungarian and Czech as well[31].

All the titles published in Poland in this period had first been released in central languages: German or French. The Journal of Bontekoe was translated from German by an anonymous translator, and Conscience's texts were translated from French by Dmochowski, an author, poet, publisher, the owner of a print-house and two bookshops, journalist and a prolific translator of French and English literature, including Balzac, Chateaubriand, Racine, Moliere, Dickens and Scott[32]. His knowledge of, and engagement with, European fiction probably helped him come across French translations of Conscience, a Flemish writer whose works were mainly translated into French in the 19th century[33]. Very little is known about the Polish translators of the other Dutch books in this period, except the information that they translated directly from Dutch. However, Wilken Englebrecht[34] insists that most translations of Netherlandic literature in Central Europe in the 19th and the early 20th centuries were mediated by German, even if the books were explicitly marked as translated «from Dutch» or «from Flemish». This may also have been the case with the novel for girls

30 For a detailed discussion of this adaptation, see R. Tanona, *Poolse bewerking voor kinderen van De kleine Johannes door Frederik van Eeden als dubbele adaptatie*, «Niderlandystyka Interdyscyplinarnie», vol. 3, n. 2, 2018, pp. 47-55 <http://nl-interdyscyplinarnie.uni.wroc.pl/wp-content/uploads/2019/08/NI3_02.pdf> (last access: 31.01.2020).

31 W. Engelbrecht, *Een boegbeeld van de morele sanering – Jo van Ammers-Küller*, in K. Van Heuckelom, D. De Bruyn, C. De Strycker (edd.), *Lage Landen Studies 5. Van Eeden tot heden. Literaire dwarsverbanden tussen Midden-Europa en de Lage Landen*, Gent, Academia Press, 2013, pp. 155-185.

32 A. Witkowska, R. Przybylski, *Romantyzm*, Warszawa, Wydawnictwo Naukowe PWN, 1997, p. 663.

33 K. Andringa, *Grote scheppen zoete broodpap: de receptie van Hendrik Conscience in Frankrijk*, «Verslagen & Mededelingen van de KANTL», vol. 123, n. 2-3, 2013, p. 273.

34 Engelbrecht, *Een boegbeeld van de morele sanering*, cit., p. 165.

Tegen den stroom op (*Against all Odds*), whose Polish version was entitled *Karin i Lila* (1938), which patently suggests that the translator or the publisher availed themselves of the German version, entitled *Karin und Lilo, zwei Mädels von heute* (1932). This vividly encapsulates the relevance of the central cultures, especially German, to the transfer from periphery to periphery in that period. The status and position of the translated authors should not be ignored either. While Conscience and Van Eeden were canonical writers, Ammers-Küller was part of popular literature. Her enormous popularity in Germany, which was fuelled by the ideological tenor of her books promoting the moral purity of females, so coveted in interwar Germany, provided a point of reference for translations in Central Europe. At the same time, as stressed by Engelbrecht[35], the author was Secretary of the Dutch PEN-Club, a position which enabled her to influence translations and sales of her books abroad.

4. *1946-1980: the increasing role of English*

After the war, German continued to be a meaningful point of reference and the source of translations, e.g. for *The Diary* of Anne Frank (1957), one of the most important Dutch books ever. The role of France in the transfer between peripheries was still visible in the publication of Anne de Vries's *Naszym dzieciom o Biblii*, 1979 (*Kleutervertelboek voor de bijbelse geschiedenis*, 1948), which was translated from French by Wanda Trandowa. The translation was re-edited six times by various publishers[36].

Similarly, An Rutgers van der Loeff's *Lawina*, 1969 (*Lawines razen*, 1954) is a translation which evidently represents the tendency of the peripheral Polish culture to look up to the centre. Loeff, Frank and De Vries belong to the most frequently translated group of authors, and the translations of their books into the central languages had been published before their Polish versions were released. *Lawines razen* appeared in German in 1956, won the Deutscher Jugendbuchpreis in 1957, and in 1968 the author's consecrated status was stamped by the prestigious Staatsprijs voor Kinder- en Jeugdliteratuur (the present-day Theo Thijssenprijs), a lifetime achievement prize awarded to writers for children. However, the book was translated into Polish from English, which may suggest the increasing role of English in the transfer from the Netherlands to Poland.

Jo Elsendoorn is an intriguing example of transfer. Elsendoorn neither enjoyed a consolidated position in children's literature in the Netherlands nor

[35] *Ibid*., p. 161.

[36] Data based on the catalogue of the National Library in Warsaw <https://www.bn.org.pl/> (last access: 14.02.2020) and WorldCat <https://www.worldcat.org/> (last access: 14.02.2020).

saw his books often translated into other languages. As the long-time artistic director of the Holland Festival, the post-war Netherlands' largest arts festival, Elsendoorn interacted with a wide range of culture makers worldwide[37]. A former prisoner of Nazi concentration camps, he described his camp experiences in *De vermorzeling. Het verhaal van een overlevende* (1979), in which he mentioned a friendship with a Polish man whom he had met in one of the transports. All this may have influenced his later contacts with Poland. In 1966, Elsendoorn was a guest at the Warsaw Autumn Festival, and in the 1970s two translations of his books for children were published in Poland. Characteristically, Elsendoorn's *De blaaspijpers van de Montelbaan* (1964) was first translated into German in 1966, and – in conformity with the prevalent transfer principles – this translation may have mediated the publication of the Polish (1970), Czech (1976) and Hungarian (1977) versions of the book. However, the Polish edition of *Jelonek Ronni*, 1978 (*De jeugd van Ruuntje het reekalf*, 1941), Elsendoorn's second book to appear in Poland, was not preceded by any prior publication in any other language. As such, it eludes the typical pattern of the from-periphery-to-periphery transfer, in which the pivotal role is played by translations published in one of the centres. The Polish version contains an information note explaining that the book was translated by Barbara Tyszka from an English text provided by the author. Whether Elsendorn came up with an English version in order to generally facilitate the translation of his book abroad or whether he deliberately developed it for the purpose of the Polish translation is still a riddle. Be that as it may, English again mediated the translation from a peripheral literature.

5. *1981-1999: not only bestsellers. The role of the Centre subsides*

Due to the economic crisis of the 1980s and the post-1989 political and economic transition in Poland, the last two decades of the 20th century did not witness any significant upsurge in the number of Polish translations from Dutch literature (eight children's and young adults' books appeared in total), even though professional translators from Dutch finally appeared on the Polish market. Nevertheless, this period was a time of a gradually growing variety and an incremental increase in volume, which was to accelerate in the 21st century. At the same time, a certain independence from the centre became observable, as qualified translators began to rely on their expertise to select source texts and translated them directly from Dutch.

[37] See I.B. Kalla, *De mier op hoge hakken. Toon Tellegen en Anne Provoost in Polen*, «Literatuur zonder leeftijd», vol. 24, 2010, p. 68.

The influence of the US and France as the centre was still to be seen in *Skrzaty*, 1990 (*Leven en werken van de kabouter*, 1976) by Wil Huygen with illustrations by Rien Poortvliet. The book spent fifty-six weeks on «The New York Times» bestseller list, was sold in over one million copies[38] and was translated into more than twenty languages. It was translated into Polish from French and proved an immense success. It had three more editions released by two prominent publishers[39] and numerous reprints. One reason for such popularity of the book was that it plugged a certain gap caused by the fact that before the 1990s the Polish reading public had no opportunity to become acquainted with the art of foreign illustrators and the 1990s were marked by a plummeting quality of book illustrations in Poland[40]. Both the communication-enhancing aesthetics of *Skrzaty* and the quality of its printing stood out against the graphic meagreness of books published in the preceding decade and, at the same time, were aligned with editorial trends dominant in the Poland of the 1990s, which have since come to be described as Disney kitsch[41]. Thea Beckman's *Krucjata w dżinsach*, 1993 (*Kruistocht in spijkerbroek*, 1973), another Dutch bestseller, was nowhere near as successful. Although the book was translated into English, French, German and several other languages and received awards both domestically (Gouden Griffel, 1974) and internationally (the European prize for best historical youth book, 1974), it never made it to the bestseller charts in Poland[42]. This may have been due to the fact that the book was released by Oficyna Wydawnicza Stopka, a newly founded, small publisher dedicated to historical books and based in the small town of Łomża. With all the changes and instabilities affecting the publishing market in Poland at that time, where a polycentric literary system was only just germinating[43], the two factors were not exactly auspicious for a young adults' book representing a peripheral literature.

Michiel, 1983 (*Oorlogswinter*, 1972), translated by the Dutch Studies graduate Ryszard Pyciak, is a book which enjoys an established reputation in the Netherlands. Besides, *Winter in Wartime*, the best-known book by Jan Terlouw, made it to the Honour List of the Hans Christian Andersen Award in 1974. Before it was translated into Polish, it had appeared in several other languages (e.g. English and French, with a German version released only later), with the French edition possibly serving as an inspiration for the Polish title of

38 J. Schuessler, *Inside the List: Gnomes and Unknowns*, «The New York Times», March 11, 2011. <https://archive.nytimes.com/www.nytimes.com/2011/03/20/books/review/InsideList-t.html> (last access: 31.01.2020).

39 In 1990, 1991 – by Instytut Wydawniczy Pax, mainly focused on religious publications; in 2011 and 2017 – by Bona, a publisher of popular children's literature.

40 Biernacka-Licznar, Jamróz-Stolarska, Paprocka, *Lilipucia rewolucja*, cit., p. 19.

41 *Ibid*., p. 20.

42 Kalla, *De mier op hoge hakken*, cit., p. 70.

43 Cf. J. Sławiński, *Zanik centrali*, in J. Sławiński, *Prace wybrane*, *Vol. 5. Przypadki poezji*, Kraków, Universitas, 2001, pp. 335-339.

the book, since solely these two language versions feature the main protagonist's name as their title.

Other translations of books by less well-known authors in this period, such as *Ben nie żyje* by Jan de Zanger, 1990 (*Ben is dood*, 1981) and *Duchy na zamku* by Ivo van Orshoven, 1998 (*Spoken spektakel*, 1993), could possibly refer to Germany as the centre, because before being translated into Polish, they were published in German, which may have affected the policy of Polish publishers. In addition, translators themselves were often initiators behind publications, especially in the case of as niche a literature as Dutch fiction, by bringing interesting titles to the attention of publishers. This can explain the publication of *Wróg bez twarzy*, 1987 (*Vijand zonder gezicht*, 1982) by the Flemish author Karel Verleyen, which had not been preceded by translations into other languages. At the time, Verleyen was still little known abroad, yet in Belgium his books for young adults (of which he wrote over 120 in total) enjoyed a considerable popularity. The Polish translation appeared five years after the publication in Belgium. Its translator, Koch, was a newly minted Wrocław-based graduate of Dutch Studies, who was just embarking on his research career, whilst at the same time applying himself to translating Dutch poetry, prose and young adults' fiction. In this case, the transfer was determined not so much by the mediation of the centre but rather by the author's strong position in the source culture and the expertise of the translator, who was thoroughly familiar with it.

Two books for a young-adult readership translated by Koch in this period represent the transfer of culturally similar content. Importantly, *Wróg bez twarzy*, which addresses the manipulation of data from computer databases, was published in Poland in 1987, i.e. before the political transition. At the time, computerisation was considered in Poland to be «a problem of Western societies» as stated in a short publisher's note inside the Polish translation. Although in 1987 computerisation sounded nearly like science fiction in Poland and the action was additionally set behind the Iron Curtain, the novel was steeped in a specific atmosphere which might well feel familiar to Polish readers growing up under socialism: the wrongly accused protagonist had to hide from the security services, could not trust the justice system and began to realise the differences between propaganda and reality.

In *Ben nie żyje*, the transfer of culturally shared themes concerned substance abuse among adolescents. In the 1980s and 1990s, the drug problem was rather located at the margin of social life in Poland, while in Zanger's book it featured as a mainstream issue affecting teenagers at a regular school.

Another manifestation of Poland's growing independence from the centre could be seen in a new, direct translation of Anne Frank's *Dziennik* (1993), a translating debut for Alicja Oczko, who had graduated from the Dutch Studies at the University of Wrocław and began a career as a translator, which brought her The Dutch Foundation for Literature's Translation Prize in 2016.

6. *2000-2019: a growing autonomy in mutual contacts among peripheries*

With expert-translators around, the books published since the 1980s have included canonical works of Dutch children's literature alongside the latest releases epitomising various literary genres. Among the translations available in bookshops, there is an increasing proportion of books for the youngest readership, including picturebooks by the Dutch masters of illustration art, such as Dick Bruna, the author of the *Miffy* series dating back to the 1950s (*Nijntje*, 1955); Max Velthuijs, the winner of the Hans Christian Andersen Award in 2004; Fiep Westendorp, whose illustrations have been a common feature in books by Annie M.G. Schmidt, the 1988 Hans Christian Andersen Award-winner, since the 1960; and finally Thé Tjong-Khing. The efforts to present these canonical Dutch illustrators to the Polish reading public seek to compensate for several decades of neglect. At the same time, books for young adults are published which range from popular titles (Tosca Menten) to texts exploring serious problems and appreciated by professional critics (Anne Provoost). A considerable part of the latest publications, both for children and for young adults, are books which reach out to certain niche audiences. For example, they dwell on taboo themes rarely addressed by home-grown writers at the time of the publication of translations, such as sexual harassment (Karel Verleyen, *Siedem dni ciemności*, 2002, Anne Provoost, *Moja ciotka jest delfinem*, 2006) or homosexuality (Linda de Haan's picturebook *Król i król* with illustrations by Stern Nijland, 2010). Another group of niche-filling books includes genres which are underrepresented in native children's literature in the period, for example literary non-fiction (Bibi Dumon Tak, *Zwierzaki-cudaki*, 2011). Last, but not least, there are also texts about children with disabilities: a child with autism in Kolet Janssen's *Mój brak jak huragan* (2004), a deaf child in Jeroen Van Haele's *Morze ciche* (2007) and a paralysed teenager in the young-adult novel *Joe Speedboat* (2009) by Tommy Wieringa. Although representations of disability have been present in Polish children's literature since the 19th century[44], the numerous translations from Dutch literature comprise an avantgarde of such literature, which promotes the inclusion of individuals with disabilities as equally contributing, fully-fledged and co-responsible participants in social life in their own right[45].

Strikingly, multiple translations of Dutch children's literature in this period redress the gaps in the target culture, which is their shared distinctive feature, while their status in the central cultures appears to be of secondary importance.

[44] A. Fidowicz, *Niepełnosprawność w polskiej literaturze dla dzieci XIX wieku*, «Wielogłos», vol. 30, n. 4, 2016, pp. 111-126.

[45] For a discussion of new tendencies in representing disability in children's literature in the 21st century, see J. Wlaźnik, *Spotkanie z Innym – obraz osób z zespołem Downa w polskiej literaturze dziecięcej i młodzieżowej*, «Niepełnosprawność – zagadnienia, problemy, rozwiązania», vol. 31, n. 2, 2019, pp. 38-66.

This insight is corroborated by the research on small publishers specialising in children's literature, conducted by Katarzyna Biernacka-Licznar, Natalia Paprocka and Elżbieta Jamróz-Stolarska. Labelled 'Lilliputian publishers', these publishing houses, which initiated essential changes to the Polish market of children's books early in the 21st century, have released a considerable portion of Polish translations of Dutch literature. In their *Lilipucia rewolucja* (2018), which examines the mechanisms behind the selection of books for publication, Biernacka-Licznar, Jamróz-Stolarska and Paprocka highlight the crucial role of individuals – the owners of these small publishing houses – who usually combine several roles, above all that of translator and expert deeply knowledgeable about the foreign markets of children's and young adult literature. In making decisions about publishing translations (which make up two-thirds of the titles released by the Lilliputian publishers), these autonomy-appreciating publishers are guided by such criteria as innovatory editorial and graphic designs, thematic originality and a different attitude to young readers than that typically encountered in Polish literature[46].

Funding schemes are also a relevant factor in the selection process. For Dutch literature, grants are awarded by the Dutch Foundation for Literature, which supports translations of Dutch authors, and by Flanders Literature, which subsidises translations of Flemish texts. Emphatically, these institutions are committed both to the literary quality of the subsidised titles, predominantly financing books by awarded and canonical authors, and to the quality of translations, exclusively supporting direct translations and verifying translators by means of their own accreditation systems. A considerable majority of translations are published by Wydawnictwo Dwie Siostry and by Wydawnictwo Hokus-Pokus, both classified as the 'Lilliputian publishers'. Dwie Siostry is co-owned by Jadwiga Jędryas, a translator who has penned the largest number 8dedication that Dutch takes seventh place – behind Polish, Swedish, French, English, German and Spanish – among the books released by the Lilliputian publishers, accounting for 3.6% of their production between 2000 and 2015[47]. Notably, the second position in this ranking is occupied by Swedish (as much as 22.4%), rather than by any central language. This indicates that in the 21st century, the central position of language and culture is but one of multiple factors that determine the periphery-periphery transfer, which is governed by its own mechanisms and primarily results from mediation by institutions which support translations by funding and facilitating publications, as well as by actors who operate as intermediaries between peripheries. This intuition was confirmed by Jędryas, whom I interviewed by mail. The by-passing of the centre combined with the simultaneous active engagement of the translator is exemplified by the publication of *Morze ciche* by Jeroen van Haele with

[46] Biernacka-Licznar, Jamróz-Stolarska, Paprocka, *Lilipucia rewolucja*, cit., pp. 31-32.
[47] *Ibid.*, p. 45.

illustrations by Sabine Clement. The book first caught the translator's attention with its graphic design and then captivated her with its approach to the central theme of disability. It has neither won any awards nor been translated into any other language. Yet, in Poland, it has had some remarkable resonance: it has been re-edited and adapted to the stage in an innovative production, in which actresses perform a play for a hearing audience but simultaneously translate their parts into the Polish sign language. Jędryas writes that she persuaded the director to bring a theatrical adaptation of this book to the stage[48]. She also insists that an engaged translator has an enormous role to play by explaining the context to the publisher, for example, describing the reception of the book in the source culture or highlighting the relevance of the awards it has won.

Though prioritising above all her own preferences and «delights» Jędryas is empathic about the exigency of familiarity with current trends, which is possible through regular examinations of publishers' websites, reviews in the press, the blogs and portals of the Dutch Foundation for Literature and Flanders Literature and the Facebook profiles of these institutions: «If a book has made a splash because it has been awarded or the publisher boasts about its reception in Germany or elsewhere, you easier 'register' such a book and remember it, and when it comes to reading, I am then quicker and more eager than with one I have never heard of before»[49].

Asked about looking up to the centres, Jędryas explains that the fact that a book has been recognised in a hyper-central language tends to be an important argument in persuading editors, publishers and their promotion and sales departments «to consult a review in English, the reception abroad. If a non-English book has reached such heights that it has been published in English, this opens doors before it across the globe. Suddenly, it becomes available to readers in all corners of the world. If something makes its mark in English, it guarantees, or at least immensely facilitates, selling the title to another language area»[50]. At the same time, Jędryas underscores the role of Germany as the centre: «It matters to me personally (and to us all at the publishing house) whether the book has been shortlisted to the very prestigious Deutscher Jugendliteraturpreis. To be among the nominees is to climb Mount Parnassus. I invariably admire Germans and envy them that they value children's and young adult literature so highly, which shows in the proliferation of reviews of children's books in leading German dailies and radio broadcasts. Selecting foreign language fiction, we are often reasserted in our belief that something is worth publishing if the book turns out to have appeared and made a splash on the German market»[51].

[48] Jadwiga Jędryas, in a private correspondance of 2nd Ferburary 2020.
[49] *Ibid.*
[50] *Ibid.*
[51] *Ibid.*

The importance of a translator's engagement, mediation and impact on editorial decisions is vividly exemplified in the translation of *Het zijn toeren* (2003) by Geert De Kockere, even though some facts could be viewed as implying that the transfer was affected by the mediation of the centre. The book has actually been translated exclusively into French (2004) and Polish (2006). This could easily be linked to the presentation of Dutch and Flemish literature at the literary gala that was the *Phares du Nord* Salon du Livre in Paris in 2003. Nasza Księgarnia, Poland's biggest and oldest publisher specialising in children's books, theoretically could have found out about this book during the event. However, in practice, the book made its way to the Polish market directly from publisher to publisher. Oczko, who was working as an editor-cum-translator for Nasza Księgarnia at the time, chanced upon De Kockere's *Het zijn toeren!* while studying the catalogue of De Eenhoorn, a Belgian publisher with which Nasza Księgarnia had a standing cooperation. Oczko convinced the publisher's decision-makers that the book would be a good pick and then translated it herself. At the same time, the publication is an interesting example of acculturation. Specifically, the translator and the editor agreed that the ending of one story (*De mol*) was too cruel for a child readership in Poland and asked the author to write a new version of the story, ending on a subtler and more optimistic note. This variant of the text exists exclusively in the Polish translation[52].

The mediation of the centre is an important factor primarily in pursuit of economic success. This is perfectly illustrated by the indirect translation (via German) of *Het Eos-project* by Mirjam Mous, an author of thrillers for young adults which are widely read in the Netherlands. The book was published by Butterfly, a small publishing house which is new to the Polish market and which has also published two books from «The New York Times» bestseller list: *This Is Where It Ends*, 2016 (Polish translation *Chłopak, który bał się być sam*, 2016) and *Before I Let Go*, 2018 (Polish translation *Zanim odejdę*, 2019), both authored by previously mentioned Marieke Nijkamp, who, though Dutch by birth, writes in English by choice.

Economic factors were most likely also involved in the indirect (via English) translation of Bibi Dumon Tak's *Soldaat Wojtek*, which tells the story of the famous bear Wojtek enlisted as a soldier with the Polish II Corps under the command of General Anders. Since there are many English-Polish translators, translations from English are more cost-effective and the publisher in all probability was in a hurry to tap into the renewed interest in Wojtek, flourishing both in Poland and in Europe, as attested by various cultural manifestations

[52] Information offered by Alicja Oczko in a private correspondence of 8th February 2020.

from documentaries[53], to theatre productions, songs, board games, memorials and street names, to literature targeting, in particular, children and young adults.

Conclusion

This survey of translated Dutch and Flemish children's and young adult literature in Poland implies a handful of conclusions concerning the mediation of the centre. Firstly, the periphery-to-periphery transfer most frequently involves books by authors who enjoy a consolidated status in the source culture; they are consecrated either by professional critical acclaim (Hendrik Conscience, Frederik van Eeden) or by popularity with readers (Jo van Ammers-Küller), with this consecration later sealed by translations into the central languages. In the first period discussed in this paper, the mediation of the centre was indispensable. The German and French translations helped the books make their way to the periphery – to the Polish system of children's literature. In some cases, this journey unfolded in two stages, as books of canonical authors first appeared in the Polish system of literature for adults and then, via adaptations, in the Polish system of children's literature.

Secondly, the mediation of the centre concerns both the very translation, i.e. the language from which texts are translated, and the status of the translated author in one of the central cultures. In the second period (1946-1980), a time in which Polish culture was closed to foreign influences, the mediation of German and French in the transfer of Dutch children's literature was still crucial both in terms of the source language of translation and in terms of cultural impact. The point is that the publication of translations hinged on the prior recognition of the respective writers not only in the source culture but also in the central cultures. The authors whose texts were translated into Polish then, such as Anne Frank, An Rutgers van der Loeff and Anne de Vries, belonged to the group of the most frequently translated Dutch writers. At the same time, the case of Jo Elsendoorn indicates that the transfer can be affected by the extra-literary status of the author and his/her contacts in non-literary areas of the cultural field. The fact that Elsendoorn used a central language also facilitated the transfer. In this period, English moved to the forefront as the third central language.

Thirdly, chronologically speaking, the autonomy of peripheries in mutual interactions has been growing; at the same time, English has been gaining an

[53] The story of Wojtek was given a serious thrust by a documentary which was broadcast by the BBC, see M. Vennard, *Story of Poland's 'soldier bear' Wojtek turned into film*, BBC News, 16 November 2011, <https://www.bbc.com/news/world-europe-15736812> (last access: 8.02.2020).

ascending relevance as a translation-mediating language and the recognition of authors in English-speaking cultures (UK, US) has emerged as an increasingly pivotal factor, particularly in the 21st century.

Currently, indirect translations of Dutch texts into Polish are relatively scarce, which is due to the commitment of individual actors who combine the roles of the translator and the editor or the publisher and to the institutional policies of funding exclusively direct translations from Dutch. Since professional translators of Dutch appeared in Poland, the mediation of the centre has only sporadically concerned the source language of translation and, in each of the cases outlined above, has been driven by economic motives. The books translated via the central languages include foreign bestsellers (Huygen & Poortvliet, Nijkamp, Mous) or address themes which have newly emerged in the European cultural field, as exemplified by the tale about Wojtek the bear (Bibi Dumon Tak). The latter book stood a greater chance of success if it quickly capitalised on the sudden popularity of the Wojtek story. For her part, Marieke Nijkamp herself uses a central language, which facilitates the transfer. In recent years, as indicated by Jędryas's observations, the recognition of the author in the Anglophone culture has become an extraordinarily important criterion in editorial choice-making, since it enhances the prospects of economic success. As children's and young adult literature is a priority area in Germany, this centre continues to be an important point of reference to some publishers.

Fourthly, as more and more professional translators have been available since the 1980s, boasting a considerable expertise in Dutch letters, coupled with a familiarity with current developments within the source culture, the transfer has no longer hinged on mediation and has increasingly circumvented the centre. This tendency is exemplified by Koch's translation of Karel Verleyen in the 1980s and, in the 21st century, by Jędryas's translation of Jeroen Van Haele and Oczko's translation of Geert De Kockere. The latter also shows that the study of transfer should not be exclusively underpinned by the data implying the mediation of the centre, France in this case. In fact, the translator herself had a decisive influence on editorial decisions concerning this publication. This strongly suggests that testimonies of the actors involved should be taken into serious consideration, and if they are unavailable due to the lapse of time, archival research is vital to arrive at an informed interpretation of the facts implicated in the transfer.

In conclusion, the status of authors in their national literary system and their recognition in the central systems have been essential factors in most cases of the transfer of Dutch children's and young adult literature to Poland. Germany and, in more recent history, also the UK and the US have been the strongest centres in these interactions, with France intermittently acting as a central intermediary. Each of these instances of the mediation of the centre is a fascinating case in its own right and calls for further research based on archival records and/or personal testimonies. As is to be expected, translators'

and publishers' choices are also affected by other factors, ones which are more intimately linked to the situation in the target culture than to one or another centre. The instances of acculturation discussed in this paper and, above all, the examples of translators combining various roles and furnished with the knowledge of both cultures, highlight the fundamental role that these engaged mediators play in cultural transfer.

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One hundred years of illustrated books for children in Poland: an analysis of the publishing market in the years 1918-2018

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ABSTRACT: The article outlines the development of illustrated children's books in Poland over the last 100 years – from 1918, when Poland regained political independence, through the socialist period and the post-1989 political transition, to the beginning of the new millennium. Poland's tempestuous history involving several tectonic political, economic, social, and cultural changes has profoundly affected the publishing industry. The article highlights the impact of these transformations on the evolution of the publishing repertoire and editorial designs of children's books, as well as addressing the crucial role of private and state-owned publishers throughout the period. Additionally, major trends, styles, and tendencies that can be observed in book-illustration artwork for a young readership are discussed alongside those of Poland's seminal book artists, their achievements, and the international distinctions conferred on them, which have made illustrated Polish children's books recognisable and appreciated across the world.

EET/TEE KEYWORDS: Illustrated books; Publishing market; Children's literature; Polish children's publishers; Poland; XXth-XXIst Centuries.

Introduction

The children's book is an integral piece of communication that is composed of heterogeneous (textual, iconic, and typographic) materials and shaped in specific ways in order to match the needs, reception capacities, and communicative situation of young recipients and to accomplish goals that it is assigned directly by the senders (i.e., the author, the illustrator, and the editor)[1]. The children's

[1] I. Socha, *Książka dla dzieci i młodzieży*, in A. Żbikowska-Migoń, M. Skalska-Zlat (edd.), *Encyklopedia książki*, Wrocław, Wydawnictwo Uniwersytetu Wrocławskiego, 2017, Vol. II, p.

book is an extreme exemplification of how the form of printing depends on the target readership. Because the coherence of language and graphic signs on the one hand and their material vehicle on the other lies at its core[2], this type of publication is immediately recognisable in bookshops and libraries.

Illustrations are an indispensable component of children's books. We know today that the illustration is often the site of a child's first – and sometimes only – encounter with art. Admittedly, illustrations are featured in all types of children's books, yet their functions vary widely. All book illustrations are expected to meet the same requirements: a germane relation to the text, a high artistic quality, and a strict alignment with the book, whose aesthetic appearance they determine. The content and the form of illustrations must be adjusted to the mental characteristics of the target readership at various developmental stages, as their importance increases inversely with regards to the age of their readers; indeed, their role is most significant in the case of the youngest readers. Illustrations must also dovetail with the character and themes of the text[3]. Since text and image together form the cohesive substance of illustrated books, they must be studied jointly as a composite object of research[4].

Children's books in their ultimate shape are produced in and through a collaboration of several people. Alongside authors and illustrators, publishers are meaningfully involved in the production of children's books, as their choices and decisions determine both the publishing repertoire and the editorial quality of books for a young readership available on the market. These decisions are relatedly affected by political, social, cultural, ideological, and economic conditions, an interplay emphatically epitomised by the Polish publishing market, which has gone through a series of transformations over the last century.

In this paper, I will rely on the theoretical model developed by Michael Bhaskar[5] in order to comprehensively capture the changing circumstances in which the publishers of children's books in Poland operated in the period under study. Their work will be examined in the context of this theory's key notions of model, frames, filtering, and amplification. Additionally, the framework of children's literary communication put forward by Hans Heino-Ewers will

112; Ead., *Przykładne, użyteczne, zabawne. O polskich książkach dla młodego odbiorcy na Śląsku w drugiej połowie XIX i na początku XX wieku*, Katowice, Wydawnictwo Uniwersytetu Śląskiego, 2001, p. 8.

[2] J. Dunin, *Książeczki dla grzecznych i niegrzecznych dzieci*, Wrocław-Warszawa-Kraków, Ossolineum, 1991, p. 5.

[3] E. Jamróz-Stolarska, *Ilustracja w książce dla dzieci*, in Żbikowska-Migoń, Skalska-Zlat (edd.), *Encyklopedia książki*, cit., Vol. I, p. 693.

[4] K. Migoń, *Biliologiczne problemy książki ilustrowanej*, in M. Komza (ed.), *Sztuka książki. Historia – teoria – praktyka*, Wrocław, Wydawnictwo Uniwersytetu Wrocławskiego, 2003, p. 16.

[5] M. Bhaskar, *The Content Machine: Towards a Theory of Publishing from the Printing Press to the Digital Network*, London-New York, Anthem Press, 2013.

help me focus on the specific role of publishers of children's books[6]. In this way, I will seek to answer the following questions: How did the changes in Poland's political and social life influence the evolution of the publishing repertoire and the editorial design of children's books between 1918 and 2018? How did the model of operations of the publishing market transform in particular timeframes? Which publishers exerted the greatest influence on the development of the illustrated book for children? Which artists contributed to the improvement of the aesthetic quality of publications for a young readership in Poland?

1. *Before 1918*

Children's and young adult's literature emerged in Poland as a separate branch of writing in the Enlightenment, although Grzegorz Leszczyński insists that *Artes Dobromilenses. Nauka dobromilska w Dobromilu* [Artes Dobromilenses: Dobromil Teachings in Dobromil], which was probably authored by Jan Szczęsny Herbut and published in 1613, was one of the first books explicitly written for young readers[7]. Nevertheless, the beginnings of Polish literature intentionally dedicated to children are usually dated back to the works penned in the first half of the 19th century by Klementyna Hoffman née Tańska (*Wiązanie Helenki* [Little Helen's Primer], 1823) and Stanisław Jachowicz (*Bajki i powieści* [Fables and Tales], 1824)[8].

Up to 1830, children's and young adults' books were mainly published by the bookselling and publishing house owned by the Wrocław-based Korn family, which had an overall formative influence on the publishing market in all partitions[9]. The titles released by this publisher tended to be bilingual, with the original text accompanied by a Polish translation[10]. They were predominantly edited in small formats and occasionally illustrated with copperplates, some of which were coloured in hand. Books offered by the Korns and other booksellers were modelled on German and French titles, often replicating them not only in terms of texts but also in terms of general editorial designs[11].

[6] H. Heino-Ewers, *Fundamental Concepts of Children's Literature Research*, New York & London, Routledge, 2009.

[7] G. Leszczyński, *Literatura dla dzieci i młodzieży*, in B. Tylicka, G. Leszczyński (edd.), *Słownik literatury dziecięcej i młodzieżowej*, Wrocław-Warszawa-Kraków, Ossolineum, 2003, p. 224.

[8] Dunin, *Książeczki dla grzecznych i niegrzecznych dzieci*, cit., p. 34.

[9] Between 1795 and 1918, Poland had no independent statehood and was divided into three parts, with each of them governed by one of the partitioning powers: Russia, Prussia and Austria.

[10] H. Lebecka, *Edytorstwo książek dla dzieci*, in Tylicka, Leszczyński (edd.), *Słownik literatury dziecięcej i młodzieżowej*, cit., p. 100.

[11] Dunin, *Książeczki dla grzecznych i niegrzecznych dzieci*, cit., pp. 35-40.

Literature for a young leadership began to flourish opulently worldwide and in Poland in the latter half of the 19th century[12]. The period was marked by a significant increase in the number of publishers whose production was addressed to the youngest readers. The market was dominated by Warsaw-based bookselling and publishing companies owned by Gustaw Adolf Gebethner and August Robert Wolff (founded in 1857), by Michał Arct (founded in 1836 and relocated from Lublin in 1887), and by Ferdynand Hoesick (founded in 1865). They stood out in terms of both their production volume and their commitment to the artistic quality of the books and their editorial design[13]. While literary imports still prevailed, the foreign models were no longer mechanically taken over, with filtering becoming more and more relevant[14]. Admittedly, chromolithographic images continued to be commissioned abroad (chiefly in Germany), but this practice provoked increasing objections (against strong, glittering colours, a 'beautifying' style, foreign realities, etc.) and enhanced readers' expectations towards Polish illustrators. Several recognised artists, such as Michał Elwiro Andriolli, Wojciech Gerson, Antoni Zaleski, Ksawery Pillati, Juliusz Kossak, and Piotr Stachiewicz, dedicated their talents to book art in that time[15].

At the turn of the 19th century, children's books that boasted not only a brilliant literary standard but also beautiful illustrations eventually came into vogue[16]. At the time, the form of books, including publications for a young readership, became an important aspect of theoretical considerations and an object of interest among fine-arts artists[17]. Some publishers of children's books in the period treated the quality of their publications as a priority; two examples are Herman Altenberg in Lviv (founded in 1880) or the already-mentioned Arct, the latter of whom «elevated the editorship of Polish children's books to the rank of an art»[18]. Founded in 1905, the publishing house of Jakub Mortkowicz also played an essential role by resolutely refusing to embellish children's books with imported German chromolithographs and collaborated with eminent Polish and foreign book artists[19]. Mortkowicz's pursuits represented the revival of printing art, referred to as the *beautiful book* movement (terminated by the

12 Leszczyński, *Literatura dla dzieci i młodzieży*, cit., p. 225.
13 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 101.
14 Dunin, *Książeczki dla grzecznych i niegrzecznych dzieci*, cit., p. 72.
15 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 101.
16 G. Leszczyński, *Wielkie małe książki. Lektury dla dzieci. I nie tylko*, Poznań, Media Rodzina, 2015, p. 274.
17 A. Boguszewska, *Idea pięknej książki w dwudziestoleciu międzywojennym w Polsce*, «Annales Universitatis Mariae Curie-Skłodowska. Sectio L, Artes», vol. 8, n. 1, 2010, pp. 51-63.
18 Leszczyński, *Wielkie małe książki. Lektury dla dzieci. I nie tylko*, cit., pp. 272-273.
19 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 101.

outbreak of WWI[20]), where the book was conceived as a work of applied arts, crucially characterised by the harmonious unity of all its elements[21].

2. *The interwar period*

In 1918, when Poland regained independence after over 100 years of erasure from the map of Europe, publishing began to thrive vigorously. In the years 1918-1939, 586 publishing houses – among which were 94 well established ones founded before Poland reclaimed sovereignty – operated within the Polish borders[22]. Most of them were small and medium-sized companies, privately owned by individual proprietors. Joint-stock companies were established increasingly often, and additionally socialised new type of publishers started to appear, which focused on the implementation of a specific programmes[23]. Nearly one third of the publishing enterprises failed to cope with financial challenges and had to suspend or terminate their operations (sometimes within but one year)[24]. Warsaw (where more than half of all publishers were based) remained the most robust publishing hub in Poland, followed by Lviv, Cracow, Poznan, Lodz and Vilnius[25].

All of these cities were home to publishers that were relevant to the production of children's books. An especially important role among Warsaw's pre-war private publishing houses was played by the companies managed by Arct (400 titles in total, with publications for children accounting for over 35% of them; Arct continued to release cheap tiny books), by Gebethner and Wolff (children's literature made up over 14% of the production volume, with

[20] K. Iwanicka, *Książka i ilustracja*, in G. Gorschenek, M. Gorschenek, H. Hilzheimer (edd.), *Almanach polskiej kultury dziecięcej*, Hamburg, Katolische Akademie, 1996, p. 204.

[21] G.P. Bąbiak, *Piękna książka na ziemiach polskich u schyłku XIX wieku*, «Sztuka Edycji», n. 2, 2013, p. 21.

[22] A. Boguszewska, *Projekty graficzne pozapodręcznikowego wyboru książek zalecanych do edukacji elementarnej w Polsce w latach 1918-1945*, Lublin, UMCS, 2013, pp. 67-68. Adam Bromberg relates that there were 560 publishing companies, mainly private ones, in Poland in 1935, see: A. Bromberg, *Książka i wydawcy*, Warszawa, PTWK, 1958, p. 9; Józef Białek cites 500-600 as the number of then-publishers, see: J. Białek, *Literatura dla dzieci i młodzieży w latach 1918-1939. Zarys monograficzny, materiały*, Warszawa, WSiP, 1987, p. 27; and Barbara Bieńkowska reports that 500 publishing companies were in operation in 1935, see: B. Bieńkowska, *Książka na przestrzeni dziejów*, Warszawa, Centrum Edukacji Bibliotekarskiej. Informacyjnej i Dokumentacyjnej, 2005, p. 235.

[23] Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 101.

[24] The financial crisis of 1929-1933 contributed to the bankruptcy of several publishers, see: J. Okopień, together with J. Czarkowska, *Poczet wydawców książki polskiej. Vol. 5: Książka wyzwolona 1918-1950*, Warszawa, "Inicjał" Andrzej Palacz, 2015, p. 12.

[25] Boguszewska, *Projekty graficzne pozapodręcznikowego wyboru książek zalecanych do edukacji elementarnej w Polsce w latach 1918-1945*, cit., p. 68.

an important place accorded to «Polska i Świat Współczesny» [Poland and the Contemporary World], an economical series of works adapted to new primary-school curricula), and by Mortkowicz (who consistently expanded the section of children's and young adults' books, with 70 such titles adding up to 20% of his total sales in this period). A company owned by Jakub Przeworski (founded in 1900) also staunchly contributed to the publication of children's books. Additionally, new publishing houses began to emerge in the capital, including Trzaska, Evert and Michalski (1920); the Towarzystwo Wydawnicze «Rój» (1924); and the Towarzystwo Wydawnicze Ignis (1920). In 1921, the Instytut Wydawniczy Nasza Księgarnia was founded following the initiative of the Polish Teachers' Association, and the Spółdzielnia Księgarsko-Wydawnicza «Książka» was set up by the Communist Party of Poland.

Zakład Narodowy im. Ossolińskich (since 1817), Altenberg's publishing company; Książnica Atlas (from 1924 onwards; about 190 titles for children); and the Państwowe Wydawnictwo Książek Szkolnych (from 1921 on, specialising in textbooks) operated in Lviv. Marian Krzyżanowski's publishing house (1869) and Anczyc's Printing House (1870) enjoyed a special recognition in Cracow, and Ludwik Fiszer's Bookshop (1882) had a similar status in Lodz. The biggest Vilnius-based publishers included Józef Zawadzki's publishing company, founded as early as 1806. Numerous publishing houses, predominantly private ones, plied their trade in Poznan, with the Catholic Księgarnia Świętego Wojciecha (1884) boasting a nationwide prestige, and Rudolf Wegner's Wydawnictwo Polskie (founded in Lviv in 1917 and moved to Poznan in 1924) garnering a reputation of its own[26].

As reported in the *Bibliografia literatury dla dzieci i młodzieży 1918-1939*, 8,617 books for a young readership were published in the interwar period[27]. About 300-400 books were released annually, and their quality varied widely from artistically advanced works to trivial texts, usually addressed to the youngest readers[28]. Translations – primarily from English, German, Italian, Russian, French, and Scandinavian languages[29] – accounted for nearly 20% of the publications[30].

Among Italian texts, *Heart* by Edmondo de Amicis clearly enjoyed the greatest popularity, as attested by its 15 editions. Regrettably, most of them had less-than-attractive graphic designs, and only three contained illustrations by Italian artists: Arnaldo Ferraguti, Enrico Nardi, and Giulio Aristide Sartorio[31].

[26] *Ibid.*, pp. 69-70.

[27] B. Krassowska, A. Grefkowicz (edd.), *Bibliografia literatury dla dzieci i młodzieży 1918-1939*, Warszawa, Biblioteka Publiczna m.st. Warszawy – Biblioteka Główna, 1995.

[28] Białek, *Literatura dla dzieci i młodzieży w latach 1918-1939. Zarys monograficzny, materiały*, cit., pp. 27-28.

[29] *Ibid.*, p. 48.

[30] M. Czarnowska, *Ilościowy rozwój polskiego ruchu wydawniczego 1501-1965*, Warszawa, Biblioteka Narodowa, 1967, pp. 114-115.

[31] K. Biernacka-Licznar, *O historii przekładów włoskiej literatury dziecięcej w Polsce do roku*

Bianca Maria Viviani della Robbia's *Legenda o kwiatach* [A Flower Legend] came complete with illustrations by Maria De Matteis from the Italian edition, and original woodcuts by Vsevolod Petrovich were retained in Cesarina Lovati's *Kukły norymberskie* (Nuremberg Puppets)[32]. Most works by Emilio Salgari, as many as eight of which were published in this period, were accompanied by pictorial materials that perfectly conveyed the climate of his novels[33]. Unfortunately, most of them did not identify the illustrators by name, but three titles were illustrated by Polish artists who enjoyed a considerable popularity in the interwar period: Antoni Gawiński, Wacław Świerczyński, and Zygmunt Jurkowski. Gawiński's illustrations also adorned Erasmo Crottolina's *Przygody mikroba* [Adventures of a Microbe]. Anna Gramatyka-Ostrowska's imaginative drawings for the only edition of Luigi Barzini's *Przygody Mikara Zapałki* [The Little Match Man] in Poland also deserve ample attention. The red-and-white plates effectively usher readers into the culture of Japan, where the action of the book is set[34]. Carlo Collodi's *Pinokio* [Pinocchio] was published only once in this period, and this edition had simple black-and-white illustrations by an unknown artist[35].

In the interwar years, several publishers offered children's and young adults' books, some of which were cheap and of meagre literary and artistic quality[36]. At the same time, there were also publishers, such as Mortkowicz and his wife Janina, who abided by the principle of «giving children the best we have» and released carefully edited, opulently designed, and educationally valuable works[37]. Their department of children's literature was managed by Janina, a writer and journalist herself, who was avidly interested in educating children through art and methodically explored the European book market, bringing precious works of foreign authors (such as Hans Christian Andersen, William Makepeace Thackeray, Selma Lagerlöf, Hugh John Lofting, James Matthew Berry, and Edith Nesbit) into the hands of Polish readers. Owing to her efforts, a group of recognised Polish writers for children (e.g. Janusz Korczak, Helena Bobińska, Bronisława Ostrowska, Zofia Rogoszówna, Zofia Żurakówna, etc.) engaged in a permanent collaboration with the publishing house[38], which was

1945, in M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, Toruń, Wydawnictwo Adam Marszałek, 2014, p. 173.

32 *Ibid.*, p. 196.

33 *Ibid.*, p. 178.

34 *Ibid.*, p. 187.

35 *Ibid.*, pp. 162-163.

36 See e.g. K. Indrzejczak, *Księgarnia Popularna*, in T. Żabski (ed.), *Słownik literatury popularnej*, Wrocław, Towarzystwo Przyjaciół Polonistyki Wrocławskiej, 1994, pp. 193-194.

37 H. Mortkowicz-Olczakowa, *Pod znakiem kłoska*, Warszawa, Państwowy Instytut Wydawniczy, 1962, pp. 152-164.

38 H. Lebecka, *Wydawnictwo Jakuba Mortkowicza*, in Tylicka, Leszczyński (edd.), *Słownik literatury dziecięcej i młodzieżowej*, cit., p. 421.

essentially committed to the aesthetic sophistication and variety of editorial designs in children's books. The Mortkowiczs contributed to challenging the practice of importing stereotypical chromolithographs from Germany, to which texts were added in Poland. Their books contained illustrations by distinguished Polish painters and drawers, such as Henryk Tom, Stanisław Dębicki, Stefan Norblin, Władysław Skoczylas, Tadeusz Gronowski, Zofia Stryjeńska, and Franciszka Themerson. They also sought out illustrations by prominent foreign artists[39]. In 1928, Mortkowicz published Andersen's *Ogród rajski* [The Garden of Paradise], illustrated by Edmund Dulac, and J. M. Barrie's *Przygody Piotrusia Pana* [Peter Pan], with original illustrations by Arthur Rackham[40].

Nasza Księgarnia, which was founded to support Poland's reviving education, was an important actor on the Polish publishing market. The publisher released magazines, textbooks, children's books, and teachers' books. By the outbreak of WWII, Nasza Księgarnia had published 454 titles, of which 191 were children's books (therein fiction, non-fiction, dramas, and textbooks). The publisher collaborated with recognised authors (e.g. Helena Boguszewska, Janina Broniewska, Czesław Centkiewicz, Hanna Januszewska, Janusz Korczak, Maria Kownacka, Lucyna Krzemieniecka, Janina Porazińska, and Ewa Szelburg-Zarembina)[41], and its artistic editorial office, managed by the painter and illustrator Michał Bylina from 1931 onwards, fostered a community of collaborating creative practitioners dedicated to art for children (including, in addition to Bylina, e.g. Stanisław Bobiński, Jadwiga Hładki, Tadeusz Gronowski, Karol Mackiewicz, and Edward Manteuffel)[42]. As a result of these pursuits, graphically compelling books appeared on the publishing market, despite technical difficulties and a scant printing base. At the same time, the publisher managed to maintain low prices and thus to accomplish one of its major goals, that is, making these publications accessible to the general public[43]. The efforts of Nasza Księgarnia saw Polish children's books achieve their first international success, as it was awarded for its educational and didactic quality and visual appeal at the International Educational Congress in Paris in 1937[44]. Its publishing agenda was recognised as exemplary in Europe[45].

In the early years of the interbellum, there was a shift in book illustrations towards folk art, with artists such as Edmund Bartłomiejczyk, Skoczylas, and

[39] *Ibid*.

[40] Dunin, *Książeczki dla grzecznych i niegrzecznych dzieci*, cit., p. 131.

[41] S. Aleksandrzak (ed.), *Pół wieku przyjaźni z dzieckiem i szkołą 1921-1971*, Warszawa, Nasza Księgarnia, 1972, p. 16.

[42] Boguszewska, *Projekty graficzne pozapodręcznikowego wyboru książek zalecanych do edukacji elementarnej w Polsce w latach 1918-1945*, cit., pp. 80-81.

[43] Aleksandrzak (ed.), *Pół wieku przyjaźni z dzieckiem i szkołą 1921-1971*, cit., p. 14.

[44] Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 102.

[45] Boguszewska, *Projekty graficzne pozapodręcznikowego wyboru książek zalecanych do edukacji elementarnej w Polsce w latach 1918-1945*, cit., p. 82.

Stryjeńska eager to draw on folklore in their work. In the late 1920s, a preference for simplified geometrical forms prevailed, and the traditional, decorative modes of illustration were gradually abandoned. In the 1930s, as Walt Disney's films garnered increasing popularity, a fascination with comics spread across Europe, including Poland. Poland's first comic book, *120 przygód Koziołka Matołka* [One Hundred and Twenty Adventures of Matołek the Billy-Goat] by Kornel Makuszyński and Marian Walentynowicz, was published in 1933.

A few years before the outbreak of WWII, works representing new textual and visual trends started to appear. They were characterised by wit, absurd humour, and playful associations, and their illustrations revolved around entirely novel motifs, such as cityscapes, urban children's everyday lives, and the world of technology. Artists began to relinquish decorative illustrations, instead embracing «simplified forms – elliptical, matter-of-fact, or sometimes playful drawings»[46], which combined text with image and thereby unsettled the previously static layout of books. This new tendency was epitomised by writers such as Julian Tuwim, Jan Brzechwa, and Stefan Themerson, and illustrators such as the Levitt-Him duo, Manteuffel, and F. Themerson[47].

Owing to the creative efforts of graphic artists and publishers, the editorial designs of books were becoming increasingly attractive. The period was marked by an enhanced inventiveness of book art, whose multiple conventions developed at that time were picked up again by post-war artists[48].

3. *The people's Republic of Poland*

During WWII, the development of children's and young adults' literature in Poland was interrupted, and publishing houses had to suspend their activities, though some of them, like Nasza Księgarnia, for example, were involved in underground operations. Several prominent authors and artists were killed, and pre-war publishing companies irretrievably lost a considerable majority of their property and output[49].

In the aftermath of WWII, as radical political and systemic changes swept across Poland, the structure of the Polish publishing industry was transformed. In 1945, private publishers, such as Arct, Gebethner, Wolff, Mortkowicz, Książnica Atlas, and Hoesick, resumed their operations, and alongside these companies, which had successfully released children's and young adults' books before the war, new publishing houses were founded. In the years 1945-1947,

46 Iwanicka, *Książka i ilustracja*, cit., p. 205.
47 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 102.
48 Leszczyński, *Wielkie małe książki. Lektury dla dzieci. I nie tylko*, cit., p. 275.
49 See e.g. Okopień, *Poczet wydawców książki polskiej*, cit.

there were 264 private publishers in Poland, which commenced the renewal of the book market in the post-war era[50]. Still, towards the end of the 1940s, private publishers were gradually closed down and replaced with a centralised publishing system that was controlled and managed by the state authorities[51]. Thirty big, specialised, state-run publishing houses had been established by 1955, and there were eventually about 60 of them in the late 1980s[52]. All of the spheres of publishing work – from the selection of texts for printing and the organisation of the production process to the distribution of books – were subordinated to the interests of the ideological and political agenda[53]. The key role was accorded to large regime-controlled publishers. In the new model of the organisation of the publishing industry, respective publishers were supposed to specialise in certain types of publications, a move devised to eventually remove competition altogether. While this goal was never fully achieved, the conditions promoting the governmental planning and control of book production were indeed put in place.

All these pursuits aimed to shape readers' behaviour through a suitably selected repertoire. As children's books became an important propaganda tool, their print runs sky-rocketed, and their publication was supported by the state's patronage. Books, which were supposed to foster socialist culture, were expected to be beautifully edited and thus evoke readers' respect. In this way, new possibilities opened up for book art, which was lavished with special attention and priority. Importantly, the themes of publications found themselves under strict scrutiny from the Central Office for the Control of the Press, Publications, and Performances, while editorial boards of publishing houses extensively practised self-censorship[54].

Publishing production was also constrained by the geopolitical conjuncture: mostly Polish literature was released, whereas translation imports were basically limited to the East Bloc countries. Indeed, over 16,000 titles for children and young adults (with a total print run of over 956 million copies)[55] appeared between 1945 and 1989, but translations only accounted for about one fifth

[50] P. Kitrasiewicz, Ł. Gołębiewski, *Rynek książki w Polsce 1944-1989*, Warszawa, Biblioteka Analiz, 2005, p. 24.

[51] Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 103.

[52] *Ruch wydawniczy. Dzieje*, in Żbikowska-Migoń, Skalska-Zlat (edd.), *Encyklopedia książki*, cit., Vol. II, p. 505.

[53] S. Kondek, *Władza i wydawcy. Polityczne uwarunkowania produkcji książek w Polsce w latach 1944-1949*, Warszawa, Biblioteka Narodowa, 1993, p. 17.

[54] M. Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, in G. Gzella, J. Gzella (edd.), *Nie należy dopuszczać do publikacji. Cenzura w PRL*, Toruń, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, 2013, pp. 99-122.

[55] E. Jamróz-Stolarska, *Serie literackie dla dzieci i młodzieży w Polsce 1945-1989. Produkcja wydawnicza i ukształtowanie edytorskie*, Warszawa, Wydawnictwo Stowarzyszenia Bibliotekarzy Polskich, 2014, pp. 31-37.

of this number[56]. With a total of 92 titles published in this period, translations of Italian literature for a young readership ranked seventh, behind English, Russian, German, French, Czechoslovakian, and Swedish literatures. The translations were mainly comprised of Italian classics of children's literature, specifically two internationally acclaimed bestsellers: *Pinocchio* and *Heart*, with illustrations by Polish artists[57]. The 1955 edition of De Amicis's *Heart* with the copperplates by Ferrugati, Nardi, and Sartorio, which was already familiar to pre-war readers, was one of the few releases in which the original illustrations by Italian artists were preserved.

A considerable part of foreign (including Italian) literature was published with graphic designs developed by the most distinguished Polish artists. For example, when generations of Poles think of Pinocchio today, they immediately tend to envision a wooden boy with characteristic long, triangular legs, as created by Jan Marcin Szancer, an image that recurred in consecutive Polish editions of Collodi's book, starting from 1950. Szancer also supplied illustrations for Gianni Rodari's *Gelsomino w Kraju Kłamczuchów* [Gelsomino in the World of Liars], published in 1962, whereas Rodari's *Opowieść o Cebulku* [Tale of Cipollino] was embellished with drawings by Mieczysław Piotrowski (1954), *Podróż Błękitnej Strzały* [The Blue Arrow] was illustrated by Stanisław Rozwadowski (1955), and *Bajki przez telefon* [Telephone Tales] was adorned by Ewa Salamon, a virtuoso of conjuring up magical worlds. Some Polish editions of Italian texts represented an uncommonly refined artistic quality, which did not fail to be recognised abroad. Prestigious distinctions were awarded, for example, to Zdzisław Witwicki for his illustrations to Guglielmo Zucconi's *Pajacyk Faramuszka* (Scaramai the Puppet; at the World's Most Beautiful Books exhibition in Frankfurt am Main in 1965[58]) and to Wiesław Majchrzak for Italo Calvino's *Baśnie włoskie* (Italian Folktales; at the International Book Art Exhibition in Leipzig in 1971)[59]. However, the fact that Polish artists were almost exclusively commissioned to supply illustrations to foreign literature had its downsides, as it caused the cultural self-enclosure of Polish book art and thus prevented Polish readers from becoming familiar with the original illustrations by appreciated Italian artists.

In the newly established publishing system, the publishing of children's literature was primarily assigned to the nationalised Nasza Księgarnia, and

[56] See: N. Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1918-2014)*, Kraków, Towarzystwo Autorów i Wydawców Prac Naukowych Universitas, 2014, chart n. 4; K. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci w Polsce w latach 1945-1989*, Warszawa, Wydawnictwo Stowarzyszenia Bibliotekarzy Polskich, 2018, pp. 82-83.

[57] Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci w Polsce w latach 1945-1989*, cit., pp. 242-243.

[58] Aleksandrzak (ed.), *Pół wieku przyjaźni z dzieckiem i szkołą 1921-1971*, cit., p. 120.

[59] *Ibid*., p. 126.

Iskry, a publishing company established by dividing the Książka i Wiedza publishing house in 1952, was appointed to publish young adults' books[60]. Other influential publishers in this field included the Biuro Wydawniczo-Propagandowe «Ruch» (founded in 1955) and the Wydawnictwo Harcerskie «Horyzonty» (from 1958). In the 1970s, children's literature was also put on the editorial agenda of two big publishers founded in that period: the Krajowa Agencja Wydawnicza (KAW) and the Młodzieżowa Agencja Wydawnicza (MAW); however, in the 1980s, children's books were already being released by several different publishers[61].

In the years 1945-1989, the children's book market undoubtedly was shaped first and foremost by Nasza Księgarnia, a publishing mogul in this sector. It officially became a state-run company in 1954, was Poland's largest publisher of children's and young adults' books and magazines, and had a decisive influence on the publishing repertoire and editorial models of children's books. Another responsibility ascribed to Nasza Księgarnia was to be «a patron and promoter of efforts for the sake of the Polish children's book»[62]. In the years 1945-1992, Nasza Księgarnia released more than 10,000 book titles with a total print run of 500 million copies, and an overall annual circulation of its magazines stood at about 60 million copies[63]. The graphic designs of Nasza Księgarnia's publications also contributed to the strong editorial position of the company. Dating back to the interwar period, its cultivation of the artistic quality of children's books became the baseline standard of its operations after WWII as well[64].

The editorial design of Nasza Księgarnia's books was determined by its artistic and graphic editorial office, first headed by Bylina and then, consecutively, by Zbigniew Rychlicki and Zdzisław Witwicki. Owing to their efforts, the publisher established collaborations with a vast number of domestic illustrators and sustained lively and permanent contacts with Warsaw's Academy of Fine Arts, which helped enlist young talents without side-lining the middle-generation artists. From the mid-1960s onwards, about 150 graphic artists collaborated with Nasza Księgarnia every year[65]. The wise tactics and consistent policies implemented by the publisher ensured good working conditions for its cooperating artists, and other Polish publishing companies soon followed in its footsteps. The production of beautiful children's books was also promoted

60 S. Siekierski, *Książka literacka. Potrzeby społeczne i ich realizacja w latach 1944-1986*, Warszawa, Wydawnictwo Naukowe PWN, 1992, p. 166.

61 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 103.

62 Aleksandrzak (ed.), *Pół wieku przyjaźni z dzieckiem i szkołą 1921-1971*, cit., pp. 5-6.

63 H. Lebecka, *Nasza Księgarnia*, in Tylicka, Leszczyński (edd.), *Słownik literatury dziecięcej i młodzieżowej*, cit., p. 263.

64 *Ibid*., p. 265.

65 A. Wincencjusz-Patyna, *Stacja ilustracja. Polska ilustracja książkowa 1950-1980. Artystyczne kreacje i realizacje*, Wrocław, Akademia Sztuk Pięknych im. Eugeniusza Gepperta: Instytut Historii Sztuki Uniwersytetu Wrocławskiego, 2008, p. 43.

by the Ruch and later by the KAW, where Szancer's successors in the post of artistic director were Janusz Stanny and then Bohdan Butenko. The Czytelnik publishing company contributed to the movement as well, under the dedicated artistic editorship of Olga Siemaszko, followed by Andrzej Heidrich[66].

The artistic work of Polish book artists was displayed at several exhibitions locally and abroad and garnered appreciation at several prestigious competitions. Important international successes certainly included awards won at the International Book Art Exhibition in Leipzig; the Milan Triennial of Applied Art; the Art Biennial in São Paulo; the Biennial of Illustration Bratislava; the Premio Europeo; the Premio Grafico in Bologna; and the Premio Catalonia in Barcelona[67]. In 1976, Janusz Grabiański became the first Polish artist to be placed on the Hans Christian Andersen Honour List, and in 1982, Rychlicki was awarded the Hans Christian Andersen Medal[68]. From 1965 onwards, UNESCO lauded Poland as an exemplary country in promoting art for children, in particular book illustrations, and from 1967, books published by Nasza Księgarnia were tipped as models to be imitated by all the UNO member states[69].

The illustration art of Polish graphic artists, which attracted international attention in the 1960s, came to be called the *Polish school of illustration*. Its practitioners relied on tradition but were at the same time receptive to new movements in art. They were inspired by folk art, Polish painting, and all contemporary trends, such as post-art-nouveau, pop art, and surrealism. At the same time, as they neither used ready-made models nor yielded to passing fads, their works were characterised by individual styles and formal innovations. The illustrators of this school shared a similar attitude to the authorial text, the readership, and the form of the children's book. They re-discovered the image-text relationship (tending to interpret rather than re-tell the story) and championed a harmonious and compositionally homogeneous architecture of the book[70]. The artists from the Polish school of illustration came from various generations, with some debuting already before WWII and most of them post-1945. While it is impossible to list them all, the most attention-deserving group certainly includes Antoni Boratyński, Butenko, Elżbieta Gaudasińska, Grabiański, Heidrich, Adam Kilian, Wiesław Majchrzak i Bożena Truchanowska, Kazimierz Mikulski, Jan Młodożeniec, Daniel Mróz, Elżbieta i Marian Murawski, Gabriel Rechowicz, Rychlicki, Ewa Salamon, Olga

66 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 104.

67 K. Iwanicka, *Ilustracja w książkach dla dzieci*, in Tylicka, Leszczyński (edd.), *Słownik literatury dziecięcej i młodzieżowej*, cit., p. 159.

68 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 105.

69 A. Wincencjusz-Patyna, *U źródeł światowych sukcesów Polskiej Szkoły Ilustracji*, «Quart», vol. 1, n. 11, 2009, p. 9.

70 Iwanicka, *Ilustracja w książkach dla dzieci*, cit., pp. 159-160.

Siemaszko, Jerzy Srokowski, Stanny, Andrzej Strumiłło, Szancer, Józef Wilkoń, Witwicki, and Bohdan Zieleniec[71].

An accelerating economic and political crisis had a very strong adverse effect on the condition of the Polish publishing industry, including children's books. Both the number of the released titles and print-run volumes decreased, and at the same time, problems with the allotments of paper (which, additionally, was of poor quality) and obsolete printing machines made the editorial quality of books plummet[72]. Nasza Księgarnia continued to be Poland's biggest publisher, but it lost its monopoly. The books of the 1980s were substandard in terms of paper, printing, and bookbinding art, and the reproductions of illustrations that they featured considerably deviated from the originals[73]. With its attention engrossed by other goals, the regime terminated its generous art patronage, rupturing the continuity of its previous cultural policies. Illustrated Polish books, which earlier had been highly ranked at international competitions, suddenly ceased to be noticed[74].

4. *The 1990s*

In 1989, as Poland's political and economic transition commenced, tectonic changes also started in the production and distribution of books, a sector that had been strictly controlled by the state before. Censorship was abolished, private business operations were legalised, and, consequently, the publishing market fundamentally transformed. The first period of the transition was extremely challenging; numerous state-owned publishing houses were disbanded, and some of them, including Nasza Księgarnia, were privatised. New publishers specialising in children's books started mushrooming, such as Literatura (1990); Siedmioróg (1990); Wilga (1992); Elżbieta Jarmołkiewicz (1990); Podsiedlik, Raniowski i Spółka (1990, Publicat S.A. since 2004); Jacek Santorski & Co (1991, Czarna Owca since 2009); Akapit Press (1992); Media Rodzina (1992); Zielona Sowa (1995); and Greg (1995). Foreign publishing corporations, such as Egmont Poland (1990) and Świat Książki Bertelsmann Media (1994), entered the Polish market[75]. In the late 1990s, an estimated

71 A. Wincencjusz-Patyna, *Stacja ilustracja. Polska ilustracja książkowa 1950-1980. Artystyczne kreacje i realizacje*, cit., pp. 159-435.

72 Jamróz-Stolarska, *Serie literackie dla dzieci i młodzieży w Polsce 1945-1989. Produkcja wydawnicza i ukształtowanie edytorskie*, cit., p. 42.

73 Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 105.

74 Wincencjusz-Patyna, *U źródeł światowych sukcesów Polskiej Szkoły Ilustracji*, cit., p. 28.

75 M. Gwadera, *Współczesny rynek książki dla dzieci i młodzieży*, in K. Heska-Kwaśniewicz (ed.), *Literatura dla dzieci i młodzieży (po roku 1980)*, Katowice, Wydawnictwo Uniwersytetu Śląskiego, 2009, Vol. II, p. 154.

2,000 publishing houses operated in Poland, with only half of them releasing more than five titles a year[76].

In the 1990s, the children's book market was virtually inundated with imported publications, many of which were comprised of licence-based texts and illustrations, purchased by Polish publishers at attractive prices. This had a considerable impact both on the form and on the editorial design of children's books, as well as causing a total decline of the Polish school of illustration. Implemented by publishers that predominantly perceived the production of children's books as a profitable business, such strategies caused the Polish market to be flooded by literature of meagre artistic quality and solely geared to commercial success. That decade is called the 'deluge' by researchers[77]. If the printing quality of these publications, with their better paper and varnished book covers, did not leave much to complain about, the paint-by-numbers style and monotony of the children's books could not go unnoticed. They substantially differed from the standards to which a young readership had become accustomed under the People's Republic of Poland[78].

What several publishers had on offer were staples, such as Walt Disney-licensed (or Disney-style) books; commercial picturebooks and popular-science books; and numerous reprints or reworkings of children's classics. Most of these publications aimed to cater to the tastes of the widest possible readership and, for this purpose, employed aesthetics geared to facilitating reading. At the same time, translations and editing were careless, particularly in the case of informational and popular-science texts[79]. The period is commonly regarded as «a less than glorious decade»[80] and referred to as a time of «Disney's dictatorship»[81].

5. *The new millennium*

With the onset of the new millennium, the Polish book market somewhat stabilised, and its incremental professionalisation commenced[82]. In the early 21st century, children's and young adults' books were released by about 200

[76] Ł. Gołębiewski, *Rynek książki w Polsce. Edycja '98*, Warszawa, Herbud, 1999, p. 15.

[77] See: D. Świerczyńska-Jelonek, G. Leszczyński, M. Zając (edd.), *Po potopie. Dziecko, książka i biblioteka w XXI wieku: Diagnozy i postulaty*, Warszawa, Wydawnictwo Stowarzyszenia Bibliotekarzy Polskich, 2008.

[78] Lebecka, *Edytorstwo książek dla dzieci*, cit., p. 105.

[79] *Ibid*., p. 106.

[80] M. Zając, *Rynek książki dla dzieci i młodzieży. Era Pottera i czas zmian*, an appendix to «Poradnik Bibliotekarza» entitled «Świat Książki Dziecięcej», n. 9, 2008, p. 2.

[81] Leszczyński, *Wielkie małe książki. Lektury dla dzieci. I nie tylko*, cit., p. 276.

[82] M. Rychlewski, *Książka jako towar, książka jako znak. Studia z socjologii literatury*, Gdańsk, Wydawnictwo Naukowe Katedra, 2013.

publishers[83], yet merely five of them controlled as much as 67% of the market. They were Egmont; Podsiadlik-Raniowski i Spółka; Kama (Sara since 2000); Wilga; and Siedmioróg[84]. However, the times were not auspicious for this sector as revenues from book sales were decreasing and several companies withdrew from publishing for children[85]. The situation started to improve in the latter half of the 2000s. New publishing houses began to include children's books in their repertoires, the position of Nasza Księgarnia consolidated, and the Wydawnictwo Olesiejuk (founded in 1999) expanded its operations, dethroning Egmont in 2000 and seizing the leadership of the market for children's books[86]. It was also in this time that a range of social and promotional campaigns were launched, increasingly often with the state's funding, in order to restore the children's book to its rightful status.

In this atmosphere, the need for less-commercial and more-ambitious literature was felt ever more acutely. In response to this need, small publishing houses that were founded mainly by young parents who were disappointed with what the Polish market offered them started to crop up. Because these companies usually consisted of two or three people and published but a handful of titles with low print runs yearly, they came to be called the Lilliputian publishers[87]. This term is common currency in research on Polish children's and young adults' literature and denotes publishers characteristically displaying the following five traits: (1) they were founded in the first decade of the 21st century; (2) they are small; (3) they are independent; (4) they produce exclusively or mainly children's and young adults' books; and (5) their books boast a high literary, artistic, and editorial quality[88].

These criteria were met by Ezop (2000); Muchomor (2002); Hokus-Pokus (2003); FRO9 (2004); Dwie Siostry (2005); Wytwórnia (2005); Format (2006); Tatarak (2007); Zakamarki (2007); Czerwony Konik (2008); EneDueRabe (2008); Babaryba (2010); Ładne Halo (2010); Entliczek (2011); Tako (2011); and Widnokrąg (2011)[89]. Notably, while some of the Lilliputian publishers have already ended their operations (e.g. FRO9), others, such as Dwie Siostry and Zakamarki, have since scaled up into big publishing houses. Additionally, a number of new small publishers whose standards and inventiveness match those of the Lilliputian pioneers have been set up over the last decade.

The Lilliputian publishers differed from big and medium publishing houses in that the former initially did not seek high revenues from sales but cast their

[83] M. Zając, *Raport o książce dla dzieci i młodzieży*, Warszawa, Biblioteka Analiz, 2006, p. 26.
[84] Ł. Gołębiewski, *Rynek książki w Polsce 2001*, Warszawa, Biblioteka Analiz, 2001, p. 43.
[85] *Ibid*., p. 49.
[86] Zając, *Rynek książki dla dzieci i młodzieży. Era Pottera i czas zmian*, cit., pp. 1-6.
[87] J. Olech, *Wydawnictwa lilipucie*, «Tygodnik Powszechny», n. 14, 2005, pp. 20-21.
[88] K. Biernacka-Licznar, E. Jamróz-Stolarska, N. Paprocka, *Lilipucia rewolucja. Awangardowe wydawnictwa dla dzieci i młodzieży w Polsce w latach 2000-2015. Produkcja wydawnicza. Bibliografia*, Warszawa, Wydawnictwo Stowarzyszenia Bibliotekarzy Polskich, 2018, p. 10.
[89] *Ibid*., pp. 21-25.

pursuits as a 'mission', aspiring to bring high-quality children's books into the Polish market. Owing to their activities, the offer of children's books in Poland diversified, and the available repertoire was expanded by adding books by new – both Polish and foreign – authors, niche editions, and books sporting avant-garde graphic designs. The Lilliputian publishers primarily offered Polish and foreign picturebooks, a genre which barely had been present in Polish bookshops before.

The small publishing houses also began to export their books, which had long seemed unrealistic due to the low artistic quality of Polish children's books in the 1990s. For example, *Mapy* [Maps] by Aleksandra and Daniel Mizieliński, published by Dwie Siostry in 2012, was an immense international success, garnering international critical acclaim (as attested by a shower of awards, including the Premio Andersen 2013) and proving an absolute export hit (with 30 editions abroad and three million copies printed by 2017)[90].

The Lilliputian publishers not only release children's books but also initiate or engage in an array of campaigns for the promotion of reading and children's books. They take part in children's book fairs in Poland and abroad; invite readers to workshops and meetings with authors and illustrators; and organise competitions and exhibitions.

Their efforts and ideas have been recognised both domestically and internationally, as testified by the multiple awards and distinctions that they have won in the competitions of the Polish IBBY Section; the Polish Society of Book Publishers; the Biennial of Illustration Bratislava; and the Best Book Design from All Over the World. Many of their titles have made it to the White Ravens catalogue kept by the International Youth Library in Munich. Since 2000, the Lilliputian publishers have basically been the only Polish publishing houses to win awards or distinctions in Bologna. So far, such recognition has been extended to the following works: *Tuwim. Wiersze dla dzieci*, 2008 [Tuwim. Poems for Children], illustrated by seven young artists; *D.O.M.E.K.* [H.O.U.S.E.] by Aleksandra and Daniel Mizieliński (2009); *Słoniątko* [The Little Elephant], authored by Adam Jaromir and illustrated by Gabriela Cichocka (2011); *Co z ciebie wyrośnie* [What Will Become of You?] by A. and D. Mizieliński (2011); *Wszystko gra* [All Tuned Up] by Anna Czerwińska-Rydel with illustrations by Marta Ignerska (2012); *Typogryzmol* [Alphadoodler] by Jan Bajtlik (2015); *Wytwórnik kulinarny* [Culinary Workbook] by Katarzyna Bogucka and Szymon Tomiło (2015); *Książka do zrobienia* [This Is a Book to Make] by Ola Cieślak (2017); *Wytwórnik górą!* [Mountains Workbook] by Madalena Matoso (2018); *Zgubiona dusza* [The Lost Soul] by Olga Tokarczuk with illustrations by Joanna Concejo (2018); and *Kominiarz-Piekarz* [Chimney

[90] M. Rachid Chehab, Mapy *światowego sukcesu. Jak polska książka sprzedała się na świecie w 3 milionach egzemplarzy*, Last updated: 13.03.2017, <http://wyborcza.pl/7,75517,21492537,mapy-swiatowego-sukcesu-jak-polska-ksiazka-sprzedala-sie.html> (last access: 10.02.2020).

Sweeper-Baker] by Dominika Czerniak-Chojnacka (2019). In 2018, Dwie Siostry won the Bologna Prize for The Best Children's Publisher of the Year.

The pursuits of the innovative Lilliputian publishers have triggered changes in the practices of big publishing houses and consequently affected the entire children's-book market. Many mainstream publishers, such as Nasza Księgarnia, Muza, Wydawnictwo Olesiejuk, and Egmont, began to release artistic picturebooks, a genre they had never produced before, and books with graphic designs by the artists of the Polish school of illustration.

Importantly, since the onset of the political transition, the proportion of foreign children's literature has considerably increased and accounts for more than half of the overall editorial production in this sector[91], with the percentage standing even higher for the Lilliputian publishers as titles by foreign authors make up two-thirds of their offerings[92]. According to the 2018 statistics, Italian children's literature takes the third place, following translated English and French texts[93]. This includes both the older and latest books that enjoy popularity and represent a high quality. While the tale of the wooden marionette boasts unabating popularity, De Amicis's *Heart*, which was enormously popular under socialism, has gone out of print altogether[94]. Among the several dozens of editions of *Pinocchio*, special attention is undoubtedly due to the one from 2011, which features Robert Innocenti's innovative illustrations replete with intriguing details. Publishers have also resumed the production of books by Rodari. The recent editions of his works include, for example, *Pinokio rymowany* [The Rhyme of Pinocchio] illustrated by Raul Verdini (2002); *Alicja w obrazkach* [Alice in Pictures], with illustrations by Anna Laura Cantone (2008); *Bajki przez telefon* [Telephone Tales] illustrated by Katarzyna Bajerowicz (2012); and *Historyjki o Alicji, która zawsze wpadała w kłopoty* [A Tale of Alice Who Always Ran into Trouble], with the graphic design by Paweł Pawlak, which was awarded an art prize by the Polish IBBY Section in 2003[95]. The first volume of Italo Calvino's *Italian Folktales* with original plates by Giuseppe Maria Mitelli was published in 2011[96]. Since 2015, Olesiejuk has

[91] Paprocka, *Sto lat przekładów dla dzieci i młodzieży w Polsce. Francuska literatura dla młodych czytelników, jej polscy wydawcy i ich strategie (1918-2014)*, cit., chart n. 5.

[92] Biernacka-Licznar, Jamróz-Stolarska, Paprocka, *Lilipucia rewolucja. Awangardowe wydawnictwa dla dzieci i młodzieży w Polsce w latach 2000-2015. Produkcja wydawnicza. Bibliografia*, cit., p. 45.

[93] O. Dawidowicz-Chymkowska (ed.), *Ruch Wydawniczy w Liczbach. Tom 67: 2018 książki*, Warszawa, Biblioteka Narodowa, 2019, p. 35.

[94] *Ibid.*, pp. 150-151.

[95] Biernacka-Licznar, Jamróz-Stolarska, Paprocka, *Lilipucia rewolucja. Awangardowe wydawnictwa dla dzieci i młodzieży w Polsce w latach 2000-2015. Produkcja wydawnicza. Bibliografia*, cit., p. 186.

[96] B. Staniów, *A jednak Pinokio! O literaturze włoskiej dla dzieci w Polsce w latach 1945-2012*, in Woźniak, Biernacka-Licznar, Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, cit., p. 250.

been releasing a series of classic fairy tales in big formats designed by Manuela Adreani; more than 10 titles in the series have appeared so far. Polish readers have also obtained access to Davide Cali's works, such as *A ja czekam…*, 2007 [I Can't Wait] and *Wróg*, 2014 [The Enemy], as well as to works by the internationally celebrated Italian author and illustrator Beatrice Alemagna, such as *Mój ukochany*, 2006 [My Love] and *Pięciu Nieudanych*, 2015 [The Five Misfits].

This implies that, after a lengthy break, Polish publishers have recently begun again to import not only foreign texts for a young readership but also foreign illustrations. Nevertheless, this has had no pernicious effect whatsoever on the development of Polish illustration art, as attested by awards and distinctions that Polish book artists win all over the world every year. Today's children's-book market has room enough to welcome both the representatives of the Polish school of illustration and the members of the middle and young generations. New talents continue to announce themselves, and, in addition to the above-listed winners of the Bologna award, the group of illustrators who have substantially contributed to the revival of Polish children's-book art also includes Iwona Chmielewska, Krystyna Lipka-Sztarbałło, Maria Ekier, Paweł Pawlak, Agata Dudek, Aleksandra Woldańska-Płocińska, Emilia Dziubak, Marianna Oklejak, Urszula Palusińska, Piotr Socha, Paweł Mildner, and Monika Hanulak.

Conclusions

The illustrated children's book market in Poland has gone through several transformations over the last century. Publishers have worked under various political, economic, and social conditions; their operation models have morphed (from private businesses, to cooperatives, to state-owned firms, back to private companies and corporations); and their goals have not always been exclusively profit-oriented, as exemplified by the regime-funded publishing industry under socialism. This is also showcased by the Lilliputian publishers, founded in the early 21st century, whose mission statement gives precedence to making comprehensively valuable books available again to a young readership. To accomplish this aim, these publishers perform relevant filtering based on consistent examinations of international children's-book markets. Similar practices were already implemented in the interwar period by Mortkowicz's publishing house, which, at the same time, was committed to the amplification of its offerings, seeking to furnish its books with high-quality graphic designs. This tendency, which received an additional boost under the People's Republic of Poland, made Polish book art famous worldwide and bred what came to be appreciatingly called the Polish school of illustration. Following the inglorious decade of the 1990s, the Polish publishing market saw the return of children's

books of outstanding literary and artistic quality. Additionally, publishers ceaselessly continue to augment their repertoires by adding previously unpublished foreign texts and new genres, including picturebooks, which were basically unknown in Poland before the onset of the new millennium. As the work of Polish authors and illustrators for children is flourishing in parallel, the word is spreading across the world that a new Polish school of illustration is in the making.

Essays and Researches

Saggi e Ricerche

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Professors' obituaries. A valuable source for studying the history of university and higher education

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ABSTRACT: This work aims at analysing and enhancing the role of professors' obituaries, which were published on the pages of the specialized periodical press during the nineteenth and twentieth centuries, for the precise and detailed reconstruction of the history of Italian university during the contemporary era. In fact, as demonstrated by the author's careful analysis, this source, which has only recently been the subject of a specific attention by historians of education and school, also has an undoubted heuristic potential in terms of history of Higher Education and University.

EET/TEE KEYWORDS: History of university; Professors; University periodicals; Obituaries; Italy; XIXth - XXth Centuries.

Introduction

A source, which has been absolutely neglected by university historiography so far, is represented by professors' obituaries, found in the periodical publications devoted to Higher Education. As a source in the history of education and school, obituaries have been really forgotten by historians of Education *tout court* in a guilty way for a long time[1], at least until 2016, when

[1] For this aspect, see in particular: A. Bianchi, *La storia della scuola in Italia dall'Unità ai giorni nostri*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 499-529; R. Sani, *Scuola e istruzione elementare in Italia dall'Unità al primo dopoguerra: itinerari storiografici e di ricerca*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento*, Milan, Vita e Pensiero, 2003, pp. 3-17; J. Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milan, FrancoAngeli, 2016.

Anna Ascenzi and Roberto Sani's innovative work, *«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)*, saw the light[2]. Analysing over two thousand obituaries about teachers from primary schools and school men (primary school headmasters, school inspectors, provincial education superintendents), published in some of the most prestigious didactic school magazines about a united Italy, the two scholars managed to reconstruct the evolution of the teacher and school official's model in different historical phases and in the light of different ideological, political and cultural contexts with an expository brilliance and an extreme wealth of details, also providing a particular and unedited cross section of the role attributed to education and school in the process of building a national identity and promoting the values of citizenship in the first century of a united Italy.

Precisely in the wake of this original work, this chapter has the aim at more specifically studying and analysing professors' obituaries as a particular genre of composition which, although its predominantly celebratory nature, can prove to be a very valuable source not only to reconstruct the complex and alternating events of the Italian University, but also, and above all, to outline the evolution of the professor's image, as it has developed and changed in the various phases of the decades-long post-unification history of our country.

This analysis was carried out on a *corpus* of about three thousand obituaries taken from the most important and renowned national magazines for professors from contemporary age[3]. In particular, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori» (1887-1891), «La Riforma Universitaria. Rassegna settimanale dell'insegnamento superiore» (1890-1891, with an impromptu resuming also in 1902) and «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani» (1894-1897) were examined with reference to the last twenty years of the nineteenth century and, especially, Crispi's period; therefore, we had the study of the obituaries published

[2] See 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.

[3] Among the most significant works carried out in the periodical press for professors, we remember in particular: G. Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, in I. Porciani (ed.), *L'Università tra Otto e Novecento: i modelli europei ed il caso italiano*, Naples, Jovene, 1994, pp. 311-377; M. Moretti, *«Noi e le nostre università». Schede sulle riviste professorali italiane fra Otto e Novecento*, in G. Angelozzi, M.T. Guerrini, G. Olmi (edd.), *Università e formazione dei ceti dirigenti. Per Gian Paolo Brizzi, pellegrino dei saperi*, Bologna, Bononia University Press, 2015, pp. 521-538; L. Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, Milan, FrancoAngeli, 2018, in particular pp. 31-54; M.R. Di Simone, *L'università italiana nella prima legislatura repubblicana: dibattiti, progetti, «leggine»*, «Annali di storia delle università italiane», vol. 22, n. 1, 2018, pp. 43-66.

about the most longevous and influential periodical in the Italian academy, that is «L'Università Italiana. Rivista dell'istruzione superiore», almost continuously published for about half a century (1902-1942); instead, for the controversial period during World War II, we focused on the "ministerial" magazine «Gli Annali della Università d'Italia. Rivista bimestrale dell'istruzione superiore» (1939-1943), while the magazines «L'Università italiana. Quindicinale di informazioni universitarie» (1946-1949) and «Il Giornale dell'Università. Organo degli atenei d'Italia» (1951-1960) were analysed for the first Republican twenty years[4].

While expressing on their pages different heterogeneous ideological and political orientations which historically characterized the Italian academy, all these periodicals can be equally interpreted as containers which were able to collect various cultural, educational, pedagogical and juridical-economic requests advanced by the Italian university world over the years[5]. Furthermore, covering a particularly significant time span of almost a century (1880-1960), they allow us to identify and examine the characteristics and the evolution recorded by obituaries as «sources» over a long period ranging from a few years following the creation of a united country to the World War I and the controversial Fascist twenty years, until the advent of the republican age and the great socio-economic-cultural changes produced in our country after the World War II.

Obituaries, which were not considered as valuable biographical sources here but, rather, as instruments of identity feeling for groups and institutions creating them[6], cannot be rightly considered obsolete and marginal literary genres[7] but, on the contrary, particular categories of composition which have played a role of primary importance in periodical publications for professors in the aftermath of the Unification for about a century. This is evidenced by the

[4] It should be remembered that a wide and detailed introduction of the purposes, the editorial structure and the contents of the columns in these last three periodicals can be particularly found in the volume L. Pomante, *L'Università italiana nel Novecento. Nuovi itinerari storiografici e inediti percorsi di ricerca*, Milan, FrancoAngeli, 2020, pp. 55-105.

[5] On this regard, see M. Moretti, *L'istruzione superiore fra i due secoli: norme, strutture e dibattiti*, in A. Casella, A. Ferraresi, G. Giuliani, E. Signori (edd.), *Una difficile modernità. Tradizioni di ricerca e comunità scientifiche in Italia (1890-1940)*, Pavia, La Goliardica Pavese, 2000, pp. 351-387 and I. Porciani, M. Moretti (edd.), *L'Università italiana. Bibliografia 1814-1914*, Florence, Olschki, 2002.

[6] About *obituaries* which are considered not only as biographical sources, but also, and above all, as instruments of identity feeling for groups and institutions creating them, see in particular the interesting work by M. Perry, *«Red Ellen Wilkinson»: Her ideas, movements and world*, Manchester, Manchester University Press, 2014.

[7] For some precise and precious observations about the "genre" of an *obituary*, see the excellent essay by G. Zazzara, *Poetiche del lutto, politiche della memoria. Epitaffi di storia tra biografia e autobiografia*, in E. Cecchinato *et alii*, *Le rotte dell'io: itinerari individuali e collettivi nelle svolte della storia d'Italia*, with an introduction by Mario Isnenghi, Naples, Scriptaweb, 2008, pp. 297-325.

constant and systematic introduction of one or more fixed columns devoted to this kind of composition within professorial magazines, confirming the precise will of each newspaper to «amalgamate the academic body, [and] strengthen internal codes, *ethos*, methods of mutual recognition thanks to circulation and dissemination»[8], precisely through the memory of dead colleagues within the entire teaching body.

Here, however, it seems appropriate to underline how, contrary to what can be found for the obituaries of teachers and school men on the pages of didactic school magazines in a united Italy, which had numerous titles to indicate this kind of compositions (they ranged from the austere sections called «Necrologie» or «Cenni necrologici» to the most evocative and refined «Lutti in Famiglia», «In memoria», «Maestri di vita oltre la morte», «Resurgent»)[9], with reference to the obituaries published in the professorial magazines, the titles used to designate each column can be considered homogeneous and lacking in great creative impulses, always resorting to sober and traditional titles, such as «Necrologio», «Necrologie», «Necrologi», «Biografie», «Lutti» or, even, in the case of the magazine, «Gli Annali della Università d'Italia. Rivista bimestrale dell'istruzione superiore», considering the inclusion of an obituary within the wider and generalist column «Le opere e i giorni», without a title.

Instead, the topic concerning the approach and the characteristics of each obituary is quite different. In this case, in fact, in perfect harmony with the obituaries of teachers and the protagonists of the Italian School, it is possible to find a certain plurality of rhetorical approaches and references also for the professorial obituaries. In fact, as we will be able to analyse below, we pass from a few lines containing the essential data of the dead people and some simple celebratory sentences suitable to the occasion of real «biographical memories», enriched by specific insights regarding the professor's professional qualities and, above all, his scientific production and valuable contribution offered to the cultural growth and development of the Nation. So, therefore, apart from the exceptions represented by professors who also had the role of ministers, parliamentarians, high-ranking ministerial officials or rectors, it is not the academic position held by dead people during their life to determine the length, importance and richness of an obituary, but their scientific relevance within the Italian university world, their «primacy» in a determined discipline and their «admirable and elevated intellectual and moral dimension». Therefore, in the light of what has been said, even in a historical phase of the Italian University, where the number of professors on the permanent staff was decidedly more

[8] Moretti, *«Noi e le nostre università». Schede sulle riviste professorali italiane fra Otto e Novecento*, cit., p. 530.

[9] See Ascenzi, 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)*, cit., pp. 9-10.

limited than the quantitative *boom* recorded since the 1980s[10], it is not rare at all to find on the pages of the magazines long-term professors on the permanent staff, who were "liquidated" with a few aseptic obituary lines, but also professors, who perhaps had fewer years of service behind them, but were more scientifically relevant and real school leaders, to whom large apologetic narratives are reserved, which are aimed at crediting the specific intellectual as a «beacon of Italic knowledge and conscience» and a «venerated master all devoted to science»[11].

Beyond these obvious and appropriate differentiations, all the obituaries which appeared in the periodical publications devoted to higher education are united by the firm intent of each magazine to never place the life or the events of the dead professors in an abstract context or within a timeless dimension, without references to the context of origin, but to always read and interpret each professor's biography and experience within the more complex story of the professorial category, thus endowing such biography and experience with a peculiar and undoubted identity value, which is able «to cover each professor's choices and work with new and deeper meanings and, at the same time, to consolidate the feeling of belonging to this category»[12], as already noted for teachers and here, more specifically, for the Italian academy.

At the end of this short introduction, taking into account the results of the analysis carried out for each obituary, which we will briefly attempt to consider on the following pages, it seems more than legitimate to assert that the obituaries published in the periodical press between the nineteenth and twentieth centuries managed to perform at least three other specific and important functions which deserve to be listed here, beyond their *naturaliter* ability to promote

[10] About the professors' employment, see in particular M. Moretti, I. Porciani, *Il reclutamento accademico in Italia. Uno sguardo retrospettivo*, «Annali di storia delle università italiane», vol. 1, 1997, pp. 11-39; G. Fois, *Reclutamento dei docenti e sistemi concorsuali, dal 1860 a oggi*, in G.P. Brizzi, P. Del Negro, A. Romano (edd.), *Storia delle Università in Italia*, 3 vols., Messina, Sicania, 2007, Vol. I, pp. 461-483; P. Rossi, *Stato giuridico, reclutamento ed evoluzione della docenza universitaria (1975-2015)*, «RT. A Journal on Research Policy & Evaluation», vol. 4, n. 1, 2016, pp. 1-14; A. Mariuzzo, *Politiche universitarie e selezione pubblica della comunità scientifica. Forme e funzioni del reclutamento accademico dall'Unità alla Seconda guerra mondiale*, in G. Ambrosino, L. De Nardis (edd.), *MaTriX. Proposte per un approccio interdisciplinare allo studio delle istituzioni*, Verona, QuiEdit, 2015, pp. 159-176; A. Graziosi, *L'Università per tutti. Riforme e crisi del sistema universitario italiano*, Bologna, il Mulino, 2010; M. Rostan, M. Vaira, *Una professione che sta cambiando*, in M. Rostan (ed.), *La professione accademica in Italia. Aspetti problemi e confronti nel contesto europeo*, Milan, Edizioni Universitarie di Lettere, Economia, Diritto, 2011, pp. 11-50; C. Franchini, *Il reclutamento dei professori universitari*, in G. Della Cananea, C. Franchini (edd.), *Concorrenza e merito nelle università. Problemi, prospettive e proposte*, Turin, Giappichelli, 2009, pp. 79-88.

[11] See D. Barduzzi, *Luigi Calori*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, no. 10, December 1896, pp. 509-511.

[12] See Ascenzi, 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)*, cit., p. 89.

and revive «the dead colleagues' memory». First of all, the columns containing them had an implicit and undeniable pedagogical value, having provided the "new recruits" of the university world real ideals and behaviour patterns, as well as examples of professional conduct, through the praiseworthy biography and the commendable experience of dead professors. Secondly, the same columns contributed much more than other kinds of interventions and articles to establish the main characteristics and the most significant features of the professorial identity in various historical phases, outlining the evolution of the professor's model in different historical contexts and the contribution he/she offered to the civil and cultural education of new generations and, in particular, the ruling class (a specific university mission). Finally, precisely in the obituaries appeared in magazines for professors, it is possible to fully grasp the constant reference to the most relevant questions and the main problematic issues which characterized the Italian university system in the contemporary age, even with the inevitable consequences on the professors' work and choices in the most delicate and controversial historical contexts. Just to quote a few examples, we could think about the development of professional and trade union associations in the late nineteenth century and the early twentieth century; the bitter battles fought for the improvement and protection of this category's legal-economic *status* all over the last century; or, again, with specific reference, for example, to the republican age, the efforts made by most of the Italian academics for the renewal of the «University» institution in relation to new needs and requests coming from the surrounding society.

1. *Professors' obituaries in the late nineteenth century (1887-1897)*

As already highlighted by the authoritative historiography of the sector, Italian University experienced a very delicate and complex phase of transition and structural reorganization in the last twenty years of the nineteenth century[13]. In fact, even without the intervention of an organic and overall reform of the entire system, but only through partial and unimportant measures, the legal and organizational structure of state universities, outlined by Minister Carlo Matteucci with the Law of July 31st, 1862, was largely changed in the late nineteenth century. In particular, while still formally in force, the immediate post-unification link between first and second degree universities, which

[13] See in particular U.M. Miozzi, *Lo sviluppo storico dell'università italiana*, Florence, Le Monnier, 1993; F. Colao, *La libertà di insegnamento e l'autonomia nell'università liberale: norme e progetti per l'istruzione superiore in Italia, 1848-1923*, Milan, Giuffrè, 1995; I. Porciani, M. Moretti, *La creazione del sistema universitario nella nuova Italia*, in Brizzi, Del Negro, Romano (edd.), *Storia delle Università in Italia*, cit., Vol. III, pp. 323-379.

had distinguished large universities from the smaller ones with significant consequences on their administrative and teaching management, as well as the salaries of the teaching class, now seemed decidedly impoverished of any real meaning, by virtue of the «equalization» policy inaugurated in the aftermath of the coming to power of Depretis's Left[14].

Furthermore, everyone considered very urgent to intervene on the main underlying problem of the Italian University, which was identified in its poor distinctly professional education provided to younger generations. However, the teaching staff, who was afflicted by a certain concern about their precarious legal-economic conditions in this period and, therefore, hoped for a ministerial action, which would return their correct and suitable dignity, was expected to decisively contribute to this university renewal[15].

In 1886, a very young influential full professor of Roman Law, such as Pietro Cogliolo, did not fail to precisely underline about this topic how it was a precise state duty to first worry about the improvement of the Italian academics' *status*, protagonists of what could be doubtless considered «the highest cultural and educational structure in the Nation»:

> We are not workers going on strike and making noise: we judge with contempt those who do not understand our high function but, as we are called to say our opinion, we will not keep silent for vile fear of speaking and we will frankly say that providing for us is providing for science, that is, the greatness of our homeland[16].

As opportunely underlined by Ariella Verrocchio, this indictment is anything but groundless, being Italy a country where the academic career did not imply the achievement of such a favourable legal status and economic condition like in other neighbouring European countries, such as France or Germany, in this

[14] About the question for equalizing the small universities of the late nineteenth century, see I. Porciani, *La questione delle piccole università dall'unificazione agli anni Ottanta*, in M. Da Passano (ed.), *Le Università minori in Italia nel XIX secolo*, Sassari, Centro interdisciplinare per la storia dell'Università di Sassari, 1993, pp. 9-18; M. Moretti, *La questione delle piccole università dai dibattiti di fine secolo al 1914*, in Da Passano, *Le Università minori in Italia nel XIX secolo*, cit.; Id., *Piccole, povere e 'libere': le università municipali nell'Italia liberale*, in G.P. Brizzi, J. Verger (edd.), *Le Università minori in Europa (secoli XV-XIX). Atti del Convegno Internazionale di Studi. Alghero, 30 ottobre-2 novembre 1996*, Soveria Mannelli, Rubbettino, 1998, pp. 533-562; L. Pomante, *Per una storia delle università minori. Il caso dello* Studium Generale Maceratense *tra Otto e Novecento*, Macerata, eum, 2013, pp. 133-186. About the so-called political line of «compromise» adopted in this period in order to equalize small universities, finally, please refer to the interesting contribution by I. Porciani, *L'eccezione e la regola: l'università italiana dell'Ottocento tra norma scritta e prassi quotidiana*, in A. Romano (ed.), *Università in Europa. Le istituzioni universitarie dal Medio Evo ai nostri giorni: struttura, organizzazione, funzionamento. Atti del Convegno Internazionale di Studi, Milazzo, 28 settembre-2 ottobre*, Soveria Mannelli, Rubbettino, 1995, pp. 625-635.

[15] M. Rossi, *Università e società in Italia alla fine dell'800*, Florence, La Nuova Italia, 1976.

[16] See P. Cogliolo, *Melanconie universitarie*, Florence, Barbera, 1887, pp. 61-62.

period[17]. It was also believed that the unequal treatment, the precariousness and the inadequacy of the professors' conditions precisely hindered the training of a highly qualified academic body in Italy, who was able to give the university system a decisive turning point in the direction of a desired renewal.

The first forms of associations among professors, who were created to protect the interests of this category, saw the light or, in any case, assumed a precise and organized physiognomy precisely in those decades, with the specific aim at monitoring the possible structural changes of the higher education system but, above all, with the hope of being able to also significantly fix them. These "union trade" experiments found one of the main tools to use in those years' periodical publications, in order to better fight their battles.

Thus, precisely with this specific objective, the first number of the magazine «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori» was published in April 1887: its first president-editor was the physicist Emilio Villari, brother of the best known Pasquale Villari and professor at the University of Bologna, and prominent intellectuals and academics, such as Pietro Albertoni, Tullio Martello, Cesare Taruffi, Pietro Cogliolo, Nicola Fornelli and an established and very active Giosuè Carducci, took turns at the editorial management of the magazine in five years[18]. As it can be already seen from the complement of the title, this periodical, which was uninterruptedly published in Bologna from 1887 to 1891, was an expression of that «Society of Professors», born in Bologna thanks to some academics, animated by the common will to improve and protect the economic and legal conditions of the entire teaching staff[19]. In the editorial which opened the first number of the magazine, its editorial board clearly explained the *mission* of the new editorial initiative which proposed and aspired to be

> the general, national and independent expression of moral and impersonal interests in higher education […], also trying to remove them from the dangerous influences of the succession of political parties and men in the government of public affairs.

In order to be able to concretely boast about this impartiality of judgment and, above all, the desired autonomy from the political sphere, «L'Università» resolved in its intentions upon categorically rejecting «preconceived ideas», to

[17] See A. Verrocchio, *I docenti universitari tra Ottocento e Novecento. Carriere, condizione economica e stato giuridico*, «Italia contemporanea», vol. 49, n. 206, 1997, pp. 65-86.

[18] The editorial board of the magazine changed its composition every year with the succession of illustrious names in the Italian academy.

[19] The first national Congress of this society took place in Milan in September 1887 and saw the participation of three hundred and fifty professors. The report of these Milanese days can be widely found in various numbers of the periodical «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», published between 1887 and 1888. For an overall about the resolutions taken, also see Verrocchio, *I docenti universitari tra Ottocento e Novecento. Carriere, condizione economica e stato giuridico*, cit., pp. 66-71.

configure itself «as a gym free from any propositions, […] extraneous to any political and religious struggles», mainly animated by the desire to seek and strengthen «a urgent and desirable bond of brotherhood and solidarity among lovers of science»[20].

Precisely as a part of this priority commitment to enhance and consolidate the role and the prerogatives of the compact and sympathetic *corpus* of professors, the symbol par excellence of the Italian *intelligenzia* and the driving power of the national ethical-civil growth during the post-unification period, a peculiar and important function was carried out by the column devoted to obituaries (with the title «Biografie» or «Necrologie», every other year) in almost all the issues of the magazine. This section of the periodical, usually published at the end of each number, was entrusted not only with the task of «preserving and cherishing» the memory of these «righteous and honest citizens and men of science», but also arousing «a desire for respect and admiration for those who chose» to «entirely devote themselves to science» and make «eminent services» to it and, therefore, being more than ever worthy of «high and appropriate commemoration» as «valiant experts».

The image of a refined professor, who is endowed with an «admirable intellect», out of the ordinary and willing to sacrifice his life «for the sake of science and studies», unequivocally represents the element which links about sixty obituaries published on the pages of «L'Università». Now, it would be enough to report the words used by the magazine edited by Villari to remind his readers among the main animators from the Technical School for Engineers in Turin the figure of the dead Giovanni Curioni, a Piedmontese engineer and full professor, who died suicide in February 1887 and «naturally inclined to career by teaching»:

> Curioni's great industriousness, which was already known to lovers of science for his publications […], shortly became evident for the number and importance of his scientific works and the theoretical and practical orientation given to his teaching. […] Prof. Giovanni Curioni had high and great mind and always brought a fine discernment and an extremely practical criterion […] out of the ordinary and difficult things to find in human race all the questions he dealt with[21].

Or, the equally evocative and eloquent words used to celebrate the dead Niccolò Cervello, a scientist coming from Palermo who passed over at the venerable age of 86, after «an entire life devoted to work, science and good for others». The Bolognese periodical believed that in his person, «one of the most reputed doctors, […] who was always prompt to rush where the danger

[20] See *Programma*, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», vol. 1, nn. 1-2, April 1887, pp. 1-2.

[21] See S. Canevazzi, *Giovanni Curioni*, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», vol. 1, nn. 3-5, May 1887, pp. 125-126.

was greater, where the disease was more violent», there were «harmoniously» all those qualities which a well-known professor should have had to be called a «real Master» to be emulated.

In his long training as a professor […], he was admirable for the scrupulous fulfilment of his duties; for a lot of doctrine, always extended to the latest advances in science; for many learned works, revealing the always young author's spirit, however his age advanced; for his love infused in many generations of disciples, who always venerated the good and learned Master[22].

As we have seen, if the unconditional love for science and the complete devotion to it throughout life represented indispensable and priority conditions for being considered professors deserving a large and detailed obituary with a very celebratory and pompous style to be published on the pages of the magazine «L'Università», it is also undeniable how the contents of the funeral compositions which appeared in that periodical were also affected by the political climate and the ideals professed in that period when they were published. In fact, in the late 1880s, Francesco Crispi's governmental parable was just at its *peak* and the nationalistic and ideological instances, which inspired this patriot coming from Agrigento, could find a certain favour even in the university world of that time. Thus, in the professors' obituaries, there were inevitably ideals, such as the lively and deep feeling of homeland, the spasmodic search for an authentic religious conscience and the exaltation of a vigorous moral rectitude, which would have made a professor an «apostle» destined to change the Nation's destiny.

Thus, if Pietro Loreta, an internationally renowned Professor of Surgery «with a big, generous and expansive heart», was also remembered as a «strenuous champion of independence and freedom […], supported by a warm love of country»[23], people, such as Angelo Ducati, best embodied, above all, the role of a «model professor», perfectly integrated into the political, ideological and cultural reality of those years. In fact, Ducati, a full Professor of Commercial Law at the University of Bologna, a convinced supporter of the Italian unification under the aegis of Savoy family in the 1850s and particularly attached to Bettino Ricasoli, was described as a «rare and shining example of uncommon virtues» in his obituary, written a few months after his death occurred in February 1887.

This man's life was entirely devoted to studies, homeland and family. He had only friends and admirers. The students saw in him a father, as well as a teacher, and willingly bended to his advice, which was always dictated by his heart and experience. Professors loved him

[22] See *Niccolò Cervello*, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», vol. 4, n. 5, May 1891, p. 305.

[23] See *Pietro Loreta*, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», vol. 3, nn. 16-20, September-December 1889, pp. 582-585.

and esteemed him very much, so that every time he went to the Faculty Council, overcoming the pains of his long illness, his presence was a party for the colleagues. If the University of Bologna mourned the loss of this meritorious man from higher education, our homeland mourned the loss of one of its best citizens[24].

If obituaries were a significant part of the magazine «L'Università», it deserves to be reported here that something similar happened, at least from a point of view of the symbolic function to be attributed to this form of composition, for another coeval university periodical, also published in Bologna and called «La Riforma Universitaria. Rassegna settimanale dell'insegnamento superiore», which was an experience limited in time, but still worthy of significant consideration. In fact, this magazine, published only between 1890 and 1892, with an extemporaneous, isolated and partial resumption of publications in 1902[25], represented the hasty and courageous attempt of Prof. Tullio Martello, professor of Political Economy at the University of Bologna, Giuseppe Garibaldi's fraternal friend and member of the expedition of the Thousand[26], to expose the problems and difficulties which afflicted university institutions, «now abandoned to all the vicissitudes of the case, all the free will acts and all the scandals of abuse and reduced in those conditions which border on anarchy and to which it keeps behind the decay», without too many awes or «hostages» of political blackmail[27].

The idea of founding a new periodical had flashed through Tullio Martello's mind, a person endowed with considerable critical spirit and a not affable character, in November 1889, when he was invited to hold the traditional inaugural lecture, to which he gave the emblematic title *La decadenza dell'Università italiana: discorso inaugurale del professore Tullio Martello alla solenne apertura degli studi nella R. Università di Bologna*, for the beginning of the academic year at the University of Bologna[28]. In this well-known intervention, the economist had accused the Italian government to have shamefully and guilty neglected a lot of university problems for too many years, with a «raw

[24] See T. Martello, *Angelo Ducati*, «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori», vol. 1, nn. 3-5, May 1887, pp. 126-127.

[25] The periodical was born as a weekly publication (and it was soon transformed into a fortnightly publication) on February 23rd, 1890 and continued its publications until May 10th, 1892. Then, it was published on January 11th, 1902 again without a fixed periodicity, in order to cease the publications with the number 17-20 of June 12th, 1902 again. On this regard, see La direzione, *Ai Professori delle Università e degli Istituti d'istruzione superiore*, «La Riforma Universitaria», vol. 3, n. 1, January 11th, 1902, p. 1.

[26] About Tullio Martello, see the exhaustive biographical profile drawn up by G. Gioli, *Martello, Tullio*, in *Dizionario Biografico degli Italiani*, Rome, Istituto della Enciclopedia Italiana, 2008, Vol. 71, pp. 84-87.

[27] See *Programma*, «La Riforma Universitaria», vol. 1, n. 1, February 23rd, 1890, p. 1.

[28] T. Martello, *La decadenza dell'Università italiana. Discorso inaugurale del professore Tullio Martello alla solenne apertura degli studi nella R. Università di Bologna (1889-1890)*, Bologna, Società Tipografica Azzoguidi, 1890.

and harsh language» and without resorting to diplomatic wordplays at all, thus demonstrating a total «ignorance» and a clear «inability» to understand what was the real university function, «a powerful lever of progress» and an excellent place for the «rebirth of civilized people», unlike what happened in other countries. Martello's speech had caused a stir both for the topic and the tones used[29], but this reaction from the public opinion and the impeached ruling class precisely persuaded this professor that the time had come to find a periodical that, precisely in the wake of the Bolognese intervention, «with freedom of thought [and] independence of judgment», aimed at «shaking» the professors' conscience, because some of them were sometimes too worried about protecting their «municipal and limited interests» on the one hand, and at leading the political class towards the most appropriate choices in order to get the «reasoned and intelligent» construction of a «new University which was able to recover the splendour of the glorious past times» on the other hand.

In this process of "rebirth" of the Italian University, a leading role would have been therefore given to the teaching class, who was called to own and be able to use the necessary cultural and intellectual tools more than any other category, in order to identify the problems afflicting the system and offer viable solutions to solve them. Therefore, in almost every issue, the pages of «La Riforma Universitaria» appear to be pervaded by the clear desire to describe the professor's ideal figure, the «righteous and honest» one, who was able to «hold his head and back high in the face of a miserable politics», predestined by his nature to «create a selected intellectual community with his fellow men», who were in charge to carry out a real mission of «civilization of the Nation».

This highly intellectual dimension, considered by Tullio Martello as the main characteristic of «real academics», was particularly made evident in both the column «Galleria dei professori» in each number of the magazine, strongly desired by the editor in order to introduce readers the portrait of some of the most illustrious living professors to be considered real «excellent masters and examples» for future generations and key figures in a possible university reform[30]; and in a few obituaries (just under twenty), included in the column called «Necrologia» and all published in the first two years of the Bolognese periodical. It is therefore no coincidence that, in order to commemorate Alessandro Tafani's death, full professor of Human Anatomy and Histology, they mainly focused on his «very beautiful and refined intelligence»[31] or, in order to worthily remember a «distinguished old-fashioned man, for both his mind and knowledge», such as Angelo Camillo De Meis, an illustrious historian

[29] On this regard, see Colao, *La libertà di insegnamento e l'autonomia nell'università liberale: norme e progetti per l'istruzione superiore in Italia, 1848-1923*, cit., pp. 286-290.

[30] The column «Galleria dei professori» will cease in the second year of the magazine's life at the request of a considerable number of professors who believed that this column had «the intention to take advantage of personal vanity» (*ibid*., p. 3).

[31] See *Alessandro Tafani*, «La Riforma Universitaria», vol. 1, n. 14, May 18th, 1890, p. 8.

of Medicine, they especially emphasized his «eminently speculative mind […], very useful to the academy»[32].

The perfect ideal of a professor, as a member of a restricted and esteemed national elite for his intellectual merits and worthy of consideration outside national boundaries, was even more embodied by men of letters, such as the priest and jurist Antonio Buccellati, who was first professor of Canon Law and then Penal Law. In order to adequately celebrate the prestige and the intellectual and scientific relevance of the Milanese priest who, together with Luigi Settembrini, had given birth to a lively *querelle* about the evaluation of Alessandro Manzoni's civil work around the 1850s, becoming his staunch defender[33], the combative magazine edited by Tullio Martello resorted to an obituary, which was very full of meanings and emblematic to clearly define which ones had to be the peculiar aspects and distinctive qualities of a professor worthy of the name.

> Students loved him very much, colleagues esteemed him, everyone respected and honoured him. He had a mild soul, an eloquent word, a frank and open character; he had an excellent heart, an immaculate conscience, a very noble mind. Mittermajer, Holtzendorff […] and other German illustrious men entrusted his name to posterity. As a Manzoni's supporter, he had admirers in literature; he loved freedom and a real and healthy democracy in politics, but he took great care not to antagonize the Curia, remaining reserved, prudent and dignified. He leaves a great void in legal science, and his death is a great loss for higher education[34].

As we have seen, if in «L'Università» and «La Riforma Universitaria», the obituaries played a leading role in the process of defining the ideal model of a late nineteenth-century professor and the high cultural and scientific educational function entrusted to this person, this ideological and editorial work found, above all, its fullest realization on the pages of the magazine «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani». The periodical founded and edited by the doctor Domenico Barduzzi, full professor of the chair of Dermosyphilopathic Clinic at the University of Siena and future rector of this university every other year, between 1898 and 1912[35], was

[32] See *Camillo De Meis*, «La Riforma Universitaria», vol. 1, nn. 37-38, March 15th, 1891, p. 13.

[33] This controversy dates back to the two-year period 1872-1873. It opposed Buccellati to Luigi Settembrini about the evaluation of Manzoni's civil work; Buccellati also held a series of conferences at the Lombard Institute to defend Manzoni, conferences which he later published in Milan in 1873 with the title *Manzoni, ossia il progresso morale, civile e letterario quale si manifesta nelle opere di A. Manzoni*. On this regard, see A. Santangelo Cordani *Alla vigilia del codice Zanardelli: Antonio Buccellati e la riforma penale nell'Italia postunitaria*, Milan, A. Giuffrè, 2008, pp. 25-29.

[34] See *Antonio Buccellati*, «La Riforma Universitaria», vol. 1, n. 15, May 25th, 1890, p. 8.

[35] About his person and the magazine edited by him, see M. Crespi, *Barduzzi, Domenico*, in *Dizionario Biografico degli Italiani*, Rome, Istituto della Enciclopedia Italiana, 1964, Vol. 6, pp. 319-320; L. Andreassi *et alii*, *Domenico Barduzzi (1847-1929)*, Siena, Accademia delle Scienze di Siena detta dei Fisiocritici, 1987.

uninterruptedly published from 1894 to 1897, undoubtedly representing one of the most successful experiences of the Italian university publications. First published by the editors Carlo Nava (1894) and Luigi Lazzeri (1895-1896) in Siena and then by an ascending editor, such as Licinio Cappelli (1897), in Rocca San Casciano with a bimonthly periodicity, it quickly became the official voice of the academy with articles and contributions of the most relevant and influential academics and intellectuals of the time on its columns. This goal of becoming the reference point for the Italian University and, above all, being the most reliable expression of various requests coming from the category of Italian professors was declared from the first number of the magazine published on March 31st, 1894. In fact, at its beginning, there was a document with the title *Programma*, which was signed by fifty-three professors and illustrated the *mission* of this new-born publication in details:

> It has been a long time since Italy spoke about the urgency of a general reorganization in university studies that today the most widespread opinion is that it has really become necessary, if we want not only to restore the ancient honour to our universities, but to make them suitable and useful to the conditions of this society.
>
> And just to face this urgent need now,
>
> in the undersigned ones, there was the idea of founding a university journal, which links all the higher education members for the protection of the highest national culture and the defence of the best common good: it seemed all that was the most appropriate to them at this moment, when the proposal for a new law is announced as the next step to solve the question of the reorganization of university studies through autonomy.

Therefore, the periodical conceived by Barduzzi and supported by a considerable number of professors, the most prestigious exponents of the Italian academy, proposed to be «alien from any local interests and much less personal» and «to offer the means to those who are in university life to present their ideas and to discuss them», and for this reason, «to be open […] to all the opinions which, while remaining different from each other, are inspired by the loyal belief of becoming beneficial to the studies and the dignity of those who profess them»[36].

To keep faith with these ambitious proposals, «L'Unione Universitaria», which was already intended to recall the identity idea of the entire professorial category in its title, immediately appeared very well structured at an organizational and editorial level, first of all having a competent and industrious editorial board, constituted by the editor Barduzzi and four talented colleagues, such as Carlo Calisse, Augusto Graziani, Luigi Guaita and Domenico Zanichelli,

[36] See *Programma*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, n. 1, March 31st, 1894, pp. 3-6.

at least in the first two years of its life[37], and dividing each issue into four precise and distinct parts («Opinioni e contributi»; «Legislazione e amministrazione», «Cronaca delle università», «Notizie varie»), which monthly provided an updated and detailed picture of everything could directly or indirectly affect the Italian university world.

Right in the column «Notizie varie»[38], besides the publication of extracts from yearbooks of each university or detailed bibliographic information about the most significant productions of the national and international academy or union trade proposals made by associations of professors or students, the professors' obituaries found a considerable importance in a specific column called «Necrologia» or «Necrologie».

About eighty obituaries have been published by the editor Barduzzi in «L'Unione Universitaria» for four years and mostly appear very large and detailed, enriched by a precise indication of the dead person's scientific production (which is sometimes even analysed with an appreciable and objective acrimony), and characterized by a refined and much more sophisticated writing than the one used in the magazines already analysed, thanks to the use of a magniloquent and refined language and lexicon.

All the funeral orations of the dead professors mainly share the attempt to make the inseparable link which should have characterized every academic shine, that is, being a «great scientist [and] honest citizen», just like the physicist Adolfo Bartoli[39], still better if he is endowed with a «versatile and deeply critical mind», such as the physiologist Cesare Studiati[40], and supported by a «frank and noble character»[41] or a «righteous and blameless soul, alien from any further servile act» at the same time[42]: these qualities are highly appreciated in men, such as the gynaecologist Alessandro Cuzzi or the zoologist Achille Quadri.

Underlining this initial assumption, it is more than justifiable the recurrence of obituaries on the pages of «L'Unione Universitaria», which become real funeral *laudationes* to remember the professors' death who distinguished themselves among all the others for being citizens «in love with their homeland», but also internationally renowned intellectuals. Besides a «glorious veteran of science,

37 In fact, starting from 1896, the editorial board of the magazine will be significantly expanded with the introduction of numerous professors of the time.

38 We do not always find this denomination officially explicit but in any case this section of the magazine, even if it is not clearly indicated with a precise name, is easily identifiable.

39 See G. Garbieri, *Adolfo Bartoli*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, n. 7, July 1896, pp. 386-387.

40 See D. Barduzzi, *Cesare Studiati*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, n. 8, November 30th, 1894, p. 508.

41 See Id., *Alessandro Cuzzi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, nn. 9-10, January 15th, 1895, pp. 629-630.

42 See D. Barduzzi, *Achille Quadri*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 9-10, November-December 1895, pp. 517-518.

homeland and university teaching»[43], such as the doctor Eugenio Giovanandi, we could also certainly count by right Ariodante Fabbretti, a convinced Mazzini's supporter and an appreciated full professor of Archaeology at the University of Turin, endowed with a «strong intelligence animated by an inflexible constancy in work and an unshakable faith in the apostolate of science» but, above all, «the most noble soul […] who, in the saddest times of Italian servitude, incited the citizens' soul to the vast understanding of a literature, which was no longer a sterile field of elucubrations, but an honoured training ground for generous lovers of freedom, recalling the historical glories of their homeland»[44].

Another image, which was widely used among the pages of obituaries published in «L'Unione Universitaria», was the one of a «soldier» ready to fight and die for an ideal, which was not necessarily only his homeland, but also his «adored science». And if the psychiatrist Augusto Tebaldi «was always ready for the struggles of life and science»[45], and another psychiatrist, Andrea Verga, chose to totally devote his life to science, as a «high intellect […] for the benefit of science and humanity», an undisputed «beacon, whose rays projected flashes of bright light in the darkest questions of science, and whose splendid light was the safe guide for many young people»[46], even science and teaching represented the only «vital missions» of the «commendable» historian and librarian Luigi Tomaso Belgrano, who died at the age of 57, «going strong as a real soldier of science in the field of work», while «he was correcting» the drafts of one of his books in press «in his Cabinet»[47] at the civic library of the Ligurian town on a public holiday.

However, on the pages of the magazine edited by Barduzzi, there were not only professors to be celebrated because of their right realization of an inseparable combination between science and homeland or professors deserving of mention for having been a «light of mind, doctrine and goodness»[48], or for their «high intellectual probity»[49] or «lively mind and righteous character»[50]. In addition to the latter, in fact, it was the precise intention of the editorial

[43] See D. Barduzzi, *Eugenio Giovanardi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, nn. 3-4, March-April 1896, pp. 240-241.

[44] See F. Guardabassi, *Ariodante Fabbretti*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, n. 8, November 30th, 1894, pp. 503-507.

[45] See P. F., *Augusto Tebaldi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 9-10, November-December 1895, pp. 514-515.

[46] See P. Funaioli, *Andrea Verga*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, nn. 1-2, January-February 1896, pp. 127-130.

[47] See G. Garbieri, *Luigi Tomaso Belgrano*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, nn. 1-2, January-February 1896, pp. 131-132.

[48] See A. Graziani, *Luigi Cossa*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, nn. 5-6, May-June 1896, pp. 318-322.

[49] See G. Tarozzi, *Luigi Ferri*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 2-3, February-March 1895, pp. 147-151.

[50] See X., *Onorato Occioni*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 9-10, November-December 1895, pp. 513-514.

board for the periodical to let also "shine" the memory of those members from the Italian academy who had particularly distinguished themselves by virtue of their precise role in politics or positions assumed at a ministerial or local level, for having faced and solved some pressing problems of the Italian university system, favouring its growth, or for having successfully fought for the improvement of the juridical-economic conditions of the entire teaching category. Thus, for example, if the naturalist Francesco Gasco had the opportunity as a «Member of the Parliament to prove himself as a deep expert especially in didactic university issues on which he exposed elevated concepts in various contingencies»[51] or the doctor Luigi De Crecchio was very «able to act with his influence in the Government to solve the question of the university buildings in Naples»[52], it was thanks to the decisive and competent interest and the bitter battles personally carried out that a professor, such as the jurist Giovanni Zucconi, managed to help «small universities»[53] and, in particular, «free universities»[54], in order to resist the harsh attacks by «abolitionist» politicians and ministers, such as Ferdinando Martini[55], and to achieve valuable goals, which were useful for their future survival.

The obituary of the lawyer from the Marches stated: - When Minister Martini showed his intention to abolish certain universities with his bill, Giovanni Zucconi began to fight him at the first announcement with the highly applauded speech to the Mutual Aid Society

[51] See D. Barduzzi, *Francesco Gasco*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, n. 7, November 15th, 1894, p. 444.

[52] See C. Raimondi, *Luigi De Crecchio*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, nn. 9-10, January 15th, 1895, pp. 625-626.

[53] About the events where the so-called «small universities» played a leading role, see in particular: I. Porciani, *Un ateneo minacciato. L'Università di Siena dalla Restaurazione alla prima guerra mondiale*, «Annali della Facoltà di Lettere e Filosofia dell'Università di Siena», vol. 12, 1991, pp. 97-129; and vol. 13, 1993, pp. 271-288; G. Fois, *L'Università di Sassari nell'Italia liberale. Dalla legge Casati alla rinascita dell'età giolittiana nelle relazioni annuali dei rettori*, Sassari, Centro interdisciplinare per la storia dell'università di Sassari, 1992; A. Mattone (ed.), *Storia dell'Università di Sassari*, 2 vols., Nuoro, Ilisso, 2010; Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello* Studium Generale Maceratense *tra Otto e Novecento*, cit. Furthermore, about modern age, please see G.P. Brizzi, *Le università minori in Italia in età moderna*, edited by Romano, *Università in Europa. Le istituzioni universitarie dal Medio Evo ai nostri giorni: struttura, organizzazione, funzionamento. Atti del Convegno Internazionale di Studi, Milazzo, 28 settembre-2 ottobre*, cit., pp. 287-296; and Id., *Le università minori in Italia. Identità e autoconsapevolezza*, in Brizzi, edited by Verger, *Le Università minori in Europa (secoli XV-XIX). Atti del Convegno Internazionale di Studi. Alghero, 30 ottobre-2 novembre 1996*, cit., pp. 169-188.

[54] About the so-called «free universities», see the above-mentioned Moretti, *Piccole, povere e 'libere': le università municipali nell'Italia liberale*, cit.

[55] First of all, about Ferdinando Martini's "abolitionist" proposal, please see F. Martini, C.F. Ferraris, *Ordinamento generale degli Istituti d'istruzione superiore. Studi e proposte*, Milan, Hoepli, 1895. Instead, for an interpretative analysis of the bill hypothesized by Ferdinando Martini and Carlo Francesco Ferraris, see M. Barbagli, *Disoccupazione intellettuale e sistema scolastico in Italia (1859-1973)*, Bologna, il Mulino, 1974, pp. 79-80; Moretti, *La questione delle piccole università dai dibattiti di fine secolo al 1914*, cit., pp. 28-32.

in Camerino. And when in 1884 another university bill, which Minister Baccelli came to introduce to the Parliament, was discussed in the Chamber, the deputy Zucconi obtained from the Chamber the registration in the State budget for 25,000 lire per year for each of the free universities, in the name of freedom to which that project was said to have been informed[56].

Another specific and exclusive peculiarity of the obituaries in «L'Unione Universitaria», compared to the ones published in other late nineteenth-century magazines analysed, is undoubtedly represented by the precise will of the editors of this periodical to bring out the appreciable expository brilliance in some professors, as well as their recognized teaching ability: these are qualities which were not common and made them particularly inclined to teaching and admired among colleagues and learners. Thus, in addition to the «gifts of the mind», a professor, such as the civil lawyer Ferdinando Bianchi, was magnified especially for «his beautiful qualities as a professor for which those who listened to his lectures cherished one of those memories of his school which cannot be forgotten».

Bianchi's obituary stated:- Indeed, the professor had eminent qualities, complete aptitudes: he owned that rare quality which is the clarity and effectiveness of the exposition; and his enthusiasm transfused into those who listened to him; not only with lively words, but also with gesture and look which accompanied the manifestation of his ideas so well. He could say truthfully, without refinement; but if he was not a scholar of the elegance of speech, he was however jealous of the property of language, of which the long stay in Tuscany had made its niceties easy and familiar[57].

Here, it is also appropriate to underline how the magazine edited by Barduzzi, which was also certainly more original and innovative than the other coeval or slightly earlier professorial periodicals, was not only limited to Italian professors' commemoration, but preferred to go beyond national borders, reporting among their columns even the celebration of some multifaceted well-known foreign academics, intellectuals or scientists, who had got in touch with our country culturally or intellectually, if not physically yet. In this way, this periodical first published in Siena and then in the small centre of Rocca San Casciano inevitably ended up taking on an international connotation and perspective, which allowed it to become a valid editorial reference even outside its homeland.

This is why we do not have to be surprised if on the pages of «L'Unione Universitaria» there are obituaries devoted to the «supreme» chemist and biologist Luigi Pasteur, whose death «is the greatest loss [of the century]

[56] See C. Calisse, *Giovanni Zucconi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, nn. 9-10, January 15th, 1895, pp. 627-628.

[57] See P. R., *Ferdinando Bianchi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 3, n. 10, December 1896, pp. 505-508.

for science [and] humanity»[58]; or to a «genius of physiology combined with physics», such as Ermanno Helmholtz, whose scientific works were «very valuable from the beginning of his career» and to whom Italian Ophthalmology «owes everything»[59]; or to a jurisconsult, such as the German Rodolfo Gneist, to whom

> Germany also owes its hegemony in the juridical field in our century […] and in Italy he gave the maximum development to an entire new school of jurists and politicians who want to legally order the administration of the state and local bodies, but not with French ideas[60].

Therefore, in the four years of the periodical's life during the nineteenth century, on the columns of «L'Unione Universitaria», there were the obituaries of all those Italian professors – and not only – who, in various ways and each one for his sphere of competence and by virtue of his personal skills, had allowed academy and science, as well as the entire professorial category, to make significant progress. The obituary devoted to the eminent surgeon Pasquale Landi, «a celebrated teacher, a distinguished citizen, […] endowed with an enlightened zealous intelligence», who died on August 4th, 1895, is probably the one which, better than the others, manages to provide an admirable synthesis of the most complete ideal of a nineteenth-century professor, an «undisputed example for all the future generations».

> As a right admirer of other people's merits, he never flattered anyone; nor did he want to be flattered by easy applauders, who unfortunately dishearten even the temple of science today. In all his actions, he showed singular prudence, strong constancy, tenacious will. […] He always kept the cult of freedom and independence of homeland high, because he was abhorrent of degrading himself into the fine mess of any rampant political servility, which was of great despair to the old conspirator's austere soul. He was firm with his friends, whom he made with discernment, and he had the esteem and respect for whom he intimately knew; and he was always honoured in an art and a science, where the poisonous tooth of envy and ignorance often has a great part in men's judgment for various and multiple contingencies. […] In the fifty years of his scientific life, Pasquale Landi combined his operational skills with a very great clinical value, an uncommon anatomical culture, a clear, elegant and deep erudition, an attractive and sagacious teaching, which could serve as an example to many people, who nowadays are too easily erected to censors and masters, but they are unconscious of their insufficiency and poorly veiled presumption or their incomplete studies, dubious proofs and forced indolence[61].

[58] See D. Barduzzi, *Luigi Pasteur*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, n. 8, October 1895, pp. 409-413.

[59] See L. Guaita, *Ermanno Helmholtz*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 1, n. 7, November 15th, 1894, pp. 439-441.

[60] See D. Zanichelli, *Rodolfo Gneist*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 6-7, June-July 1895, pp. 369-370. Among Italian jurists and politicians, followers of Gneist's ideas and theories, there were both Marco Minghetti and Silvio Spaventa in the obituary.

[61] See D. Barduzzi, *Pasquale Landi*, «L'Unione Universitaria. Periodico Mensile tra i Professori Universitari Italiani», vol. 2, nn. 6-7, June-July 1895, pp. 361-369.

2. *Professors' obituaries on the pages of «L'Università Italiana. Rivista dell'istruzione superiore» (1902-1942)*

In the early nineteenth century, the entire academic world seemed very compact in the precise desire to wonder about the function which University should have performed within a society in constant evolution. Knowing «the unavoidable link between civil and political primacy and the intellectual one, between 'Science and freedom'»[62], the professors of that time were animated by the conviction that higher education could not ignore its connection with social and economic national life of the country, contributing to its development[63], while always retaining «the greatest and exclusive cult of pure science»[64].

This widespread awareness of the interlacement between the Italian economic renewal in the early twentieth century and the new task to be assigned to high culture gave rise to a wide debate within the Italian academic world, especially in an attempt to identify the most appropriate ways through which the Italian University and its main actors (professors) could contribute to the growth of the country[65].

The periodical publications for professors obviously represented the ideal *humus* where they could grow the inevitable heterogeneity of opinions on this topic. Just within the flourishing publications of those years, a leading role must be certainly ascribed to «L'Università Italiana. Rivista dell'istruzione superiore», a politically and academically influential periodical, which was undoubtedly the longest-lived one in Italy. In fact, this publication, which was edited by the publishing house Zamorani and Albertazzi in Bologna and whose first number saw the light on May 15th, 1902, was almost uninterruptedly published until 1942 (in fact, publications were suspended for economic reasons only in December 1919, but they resumed in March 1923)[66], effectively being the official voice of the Italian University for almost half a century.

It seems appropriate here to underline how the magazine was born in a historical period of great turmoil and tumult, when the professors of the

62 See Colao, *La libertà di insegnamento e l'autonomia nell'università liberale: norme e progetti per l'istruzione superiore in Italia, 1848-1923*, cit., p. 334.

63 On this regard, see E. Bertarelli, *Trenta anni di vita delle scienze sperimentali in Italia*, «Annuario della Regia Università di Parma», 1908-1909, pp. 15-20.

64 See *Origini e sviluppo dei moderni concetti fondamentali della geometria. Discorso inaugurale dell'anno accademico 1901-1902 letto nell'Aula Magna dell'Università il 5 novembre 1901 dal professore ordinario di algebra complementare cav. Gregorio Ricci Curbastro*, «Annuario della Regia Università di Padova», 1901-1902, p. 50.

65 About this topic, see Colao, *La libertà di insegnamento e l'autonomia nell'università liberale: norme e progetti per l'istruzione superiore in Italia, 1848-1923*, cit., pp. 330-349.

66 About the reasons which had led to the suspension of the publications in 1919, please see *Ritorno. 1920-1923*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 19, n. 1, 1923, pp. 1-3.

Italian University, as well as other types of workers, intellectuals or not[67], were organizing themselves in specific associations of category, in order to be able to freely express their thoughts and thus defend their specific prerogatives and peculiarities[68].

Therefore, it was thanks to the requests coming from the world of free professors that the idea of founding a new periodical was born. Prof. Francesco Lorenzo Pullè, a distinguished philologist and glottologist, immediately grasped and understood the intuition of these free professors, gave it a voice even within their close-minded and self-referential world and, after having learned about the deliberation taken by these free professors, addressed to Prof. Gurrieri so that they could create together a publication which was an expression of the interests of the entire Italian professorial class.

> A perfect agreement between these two men was easy in order to create a university Journal, which was not at the service of any special university groups or particular political and scientific groups; to create a free Journal, which was open to all the people, without any exceptions, where the editors would have considered themselves simple collaborators. No struggles, but harmony among all the professors and the university staff of any class, for the unique good of higher education and high culture. No subsidy to the periodical, not even the so-called subscribing supporters: only living on the simple subscribers' proceeds and, if they are not enough, furling the sails without regret[69].

Thus, «L'Università Italiana» was conceived by Raffaele Gurrieri and Francesco Lorenzo Pullè and, together with Gurrieri (the real animator of the magazine), there were two prestigious co-editors and experts in the field of periodical university publications, such as the above-mentioned Domenico Barduzzi, who was already the head of «L'Unione Universitaria», as we have seen, and the physiologist Pietro Albertoni, among the founders of the above-mentioned «L'Università. Rivista dell'istruzione superiore pubblicata da una società di professori»: this magazine has proposed for almost half of the twentieth century to «bring the conscious and willing work of the participants in university life to its renewal» and «professors» tried to keep «clear and lucid the idea of the intimate connection of their body with the social organism of

[67] For example, in order to have an overall picture about the masterful associations in the early nineteenth century, see these valid works by L. Pazzaglia, *L'associazionismo magistrale cattolico: la vicenda della «Nicolò Tommaseo»*, in Id. (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 529-594; A. Barausse, *L'Unione magistrale nazionale. Dalle origini al fascismo 1901-1925*, Brescia, La Scuola, 2002.

[68] It is no coincidence that in 1905, after a gestation which lasted almost two years, the National Association of Professors [Associazione Nazionale fra i Professori Universitari (ANPU)] was born to protect the professorial category and was especially aimed at claiming a better legal and economic *status* for Italian academics.

[69] See R. Gurrieri, *Come nacque la rivista e contenuto dei trentaquattro volumi pubblicati dal 1902 al 1938*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 34, supplement to nn. 11-12, November-December 1938, pp. IX-XVI (the quotation is on pp. IX-X).

which they are an integral part, perhaps the most essential and the highest one»[70].

Among the thirty-two columns on the pages of this periodical, which undoubtedly still offer now a unique, varied and exhaustive overview of the evolution of the contemporary Italian university system in its multiple facets (from the desired or realized structural changes to the legislation produced, up to the trade union demands or the development of the Italian academic scientific production) and through four particularly complex decades during Italian history (from Giolitti's age to the World War I up to the controversial Fascist period)[71], an important role was certainly played by the column with the title «Necrologio» or «Necrologie», which collected the obituaries of the «meritorious learned people of science and culture»[72], as professors (full, extraordinary, free professors, lecturers or simple assistants) had to be considered, «whose memory is not erased, because it lives again in the egregious works which hand down and recommend their name to posterity»[73].

The magazine published over 2,500 funeral works of this kind with «the most exact news which could be collected at that time», but unfortunately they «presaged a sad and dismal thought in the academy»[74]. As expected, the considerable amount of published obituaries corresponded with the use of a considerable and appreciated plurality of stylistic approaches and linguistic and lexical registers, but also a wide range of funeral announcements from a point of view of the structure of the composition. During the forty years of the periodical's edition, the columns of «L'Università Italiana» alternated both sober and concise elaborations of a few lines with the essential biographical information of dead people, which aimed at emphasizing one or more specific human and intellectual qualities (it deals with the most considerable group of obituaries quantitatively), and real classical funeral *laudationes*, written with a poetic and erudite language, but nevertheless contained in their length, to arrive, in some cases, even to emphatic passages of several pages aimed at celebrating «the happy deeds of the exemplary dead colleague» or «the noble soul of the dead»[75] in an excessively redundant way.

[70] See *La nostra parola*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 1, n. 1, May 15th, 1902, pp. 3-6.

[71] About the editorial structure of this magazine and the columns and the related contents appeared on its pages over the years, see Gurrieri, *Come nacque la rivista e contenuto dei trentaquattro volumi pubblicati dal 1902 al 1938*, cit.

[72] See *Guido Biagi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 21, n. 1, January 1925, p. 16.

[73] See *Il prof. comm. Guglielmo Raisini*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 2, nn. 9-10, May 1st, 1903, p. 124.

[74] See Gurrieri, *Come nacque la rivista e contenuto dei trentaquattro volumi pubblicati dal 1902 al 1938*, cit., p. XV.

[75] P. Vinassa de Regny, *Carlo Riva*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 1, n. 3, June 15th, 1902, p. 52.

Thus, especially in the first two decades of the magazine's life, besides the essential funeral praises devoted to a «supreme master of history», such as the comparatist historian Rodolfo Renier[76] or a distinguished jurist, such as Luigi Maino, a more complete expression of a «real model of Italic mind who can freely range and devote himself simultaneously to various studies»[77], or a «conscientious and constant worker of science»[78], such as the historian of philosophy Romualdo Bobba, it was possible to find much larger and more resonant compositions, where there were people to be celebrated, such as the psychiatrist Francesco Roncati, an illustrious professor and doctor who embodied the ideal «of a good man with exceptional virtues […], upright to the point of scruples, disinterested, charitable with humble people, [appreciated] for his strong mind, great knowledge and noble generosity of his soul»[79]; or such as the illustrious biologist Rodolfo Virchow, a «supreme intellect, […] a chosen spirit, a tenacious and proud opponent of any systematic tendency, a very rare example of free character, independent among the most acute disagreements in science and politics»[80]. Then, the celebratory tones rose further especially in those obituaries where characters particularly significant for this magazine and its history were commemorated. In this sense, an emblematic case was represented by the publication of the funeral eulogy of the dead editor of the periodical, Pietro Albertoni. As typical in certain situations, the one who wrote the composition on four pages and even at the opening of an issue and no longer in the canonical final column was the co-editor Raffaele Gurrieri, who traced with an apologetic way a profile of his dead colleague and friend, able to embody in one person all the main moral and intellectual qualities for a scientist and professor at that time:

> A physiologist with a wide social vision, an incomparable pharmacologist, a highly appreciated clinician, a patriot […], endowed with a broad mind, also admirable for a tenacious memory, which was clear and alive up to a few hours before his death. [He] was a serene observer, he saw the problems from above: he evaluated men and things. […] His great merit was to know men and how to put them in their place. His great merits as a professor are due to this exceptional prerogative, so many strong champions were able to come out from his school. First, his laboratory of Pharmacology and, then, his laboratory of Physiology were open to everyone, without any distinction of political and religious

[76] See *Rodolfo Renier*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 14, n. 2, February 1915, p. 37.

[77] See *Luigi Maino*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 14, n. 2, February 1915, pp. 39-40.

[78] See *Romualdo Bobba*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 5, nn. 3-4, February 1st, 1906, p. 36.

[79] See *Francesco Roncati*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 5, n. 21, October 1st, 1906, p. 188.

[80] See D. Barduzzi, *Rodolfo Virchow*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 1, nn. 12-13, September 20th, 1902, pp. 167-168.

faith and belief, provided that who asked to register had the qualities of a researcher and scholar[81].

Leaving out the emphatic tones often used on the pages of «L'Università Italiana», a leading role was also reserved for those who were considered «righteous servants to science and culture» in the academy, because they were animated by «an admirable vocation» and in charge of training a new generation of professors and scholars called to leave an indelible mark in a future society. Among these, there was, in particular, the pathologist and scientist Luciano Armanni, who «populated Italian universities with worthy professors […] and left behind him a deep and perennial regret, like the footprint he marked in the history of human knowledge»[82] and «the indefatigable master» Ferdinando Paolo Ruffini, a recognized physicist-mathematician, who «has spent his excellent gifts of the mind for the benefit of schools for eleven lustra […], managing to open the ways of one of the most difficult fields of science even to mediocre minds»[83].

Between the nineteenth and twentieth centuries, there was an ambitious and considerable mission, which had led many professors from the Italian Universities, who had been invested with it, revive the intellectual and civil destine of the nation, by virtue of «a passionate love of country» and as exponents of a real «patriotic apostolate». However, in a full ideological wake with the development recorded by nationalistic movements both in Italy and throughout Europe in the early twentieth century, the exaltation of a strong link between dead academics and their homeland was very common in many funeral eulogies, with the aim at arousing similar feelings and proposals in the colleagues still alive and in the firm and shared belief that the civil and political rebirth and progress of the nation precisely passed through its intellectual and cultural redemption. So, if there were some scholars, such as the paediatrician Dante Cervesato or the philosopher Luigi Bàrbera, who were emphasized, above all, as «the chosen soul [who gets excited] over the high ideals of the country»[84] or having been «a fervent lover of the risen homeland»[85] for a lifetime respectively, the mathematician Luigi Cremona represented especially the perfect prototype of a professor, who was «an apostle of the nation», mainly moved by the

[81] See R. Gurrieri, *Pietro Albertoni*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 29, n. 12, December 1933, pp. 197-200.

[82] See *Luciano Armanni*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 2, nn. 9-10, May 1st, 1903, pp. 122-123.

[83] See *Ferdinando Paolo Ruffini*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 7, nn. 2-4, January 16th, 1908, p. 32.

[84] See *Dante Cervesato*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 2, n. 3, January 31st, 1903, pp. 24-25.

[85] See *Luigi Bàrbera*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 3, n. 3, February 1st, 1904, p. 24.

intense love [for a] homeland which He wanted not only free from the foreigner's political lordship by force of arms, but also emancipated and powerful in the field of the Idea for a provident wisdom of its educational institutions and the progress of severe studies[86].

In view of a desired cultural and political rebirth of the country, a decisive contribution could also come from the prestige internationally achieved by the Italian teaching class. That's why on the pages of «L'Università Italiana» there was a considerable number of obituaries, whose aim was to highlight the recognized scientific merits of the dead professors also coming beyond national borders. Thus, in addition to praises for real «internationally well-known men of genius»[87], such as Cesare Lombroso, father of modern criminology, or refined anatomists, such as Giovanni Battista Grassi, «whose name will remain among the greatest naturalists in our era» and «whose sudden death is a serious mourning for Italian and worldwide science»[88], on the columns of the magazine there were also praises for characters who were less known to people, but they had certainly increased the scientific value of the Italian Universities thanks to their scientific works. For example, this was the case for the «noble soul» of the mineralogist Carlo Riva, who died as a victim of an avalanche during an ascent of Grigna in the Lombard Prealps: we remember that «he linked the consideration for his Italian colleagues with the one for the foreigners, who highly valued him»[89]; or an «indefatigable worker», such as Augusto Napoleone Berlese, whose «numerous publications were celebrated, […] and let him earn a great consideration more abroad than in Italy»[90].

Furthermore, another aspect worthy of mention also emerges from the *corpus* of obituaries which appeared in the magazine edited by Gurrieri. In fact, the drafters of the funeral eulogies appear clearly animated by the desire to place dead professors' life and events within the precise historical, social and cultural context where the dead had lived. Therefore, each professor's biography and experience ended up being perfectly integrated into his contemporary reality trying, above all, to bring out their interest in the events relating to higher education and the most specific ones regarding living and working conditions of the professorial category, whose commemorated professor had actively contributed to its improvement during his life.

For example, with a specific reference to the category of free professors, this was the case of characters, such as the man of letters Solone Ambrosoli,

86 See F. Enriques, *Luigi Cremona*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 2, n. 13, June 15th, 1903, p. 160.

87 See E. Ferri, *Cesare Lombroso*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 8, n. 21, November 1st, 1909, pp. 176-177.

88 See *Giovanni Battista Grassi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 21, n. 5, May 1925, p. 87.

89 See Vinassa de Regny, *Carlo Riva*, cit.

90 See F. Cavara, *Augusto Napoleone Berlese*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 2, n. 5, March 2nd, 1903, p. 64.

president of the group «Free Professors in Milan», which he founded and of which «had been in charge with love to give free teaching all the freedom to be enjoyed, prestige and value back»[91]; or the theoretical philosopher Carlo Cantoni who «said a lot of things in support of free teaching, because he would have liked it more widespread and effective than it is today»[92], even in the moments when he held senior positions at the University of Pavia (he was dean at the Faculty of Humanities and rector at the University of Pavia).

On the pages of the Bolognese magazine, there was undoubtedly a considerable number of professors, who were celebrated for not only having been in charge of the protection and enhancement of their legal-economic *status* for the teaching category, but also the improvement of the entire Italian university system over the course of their lives, trying to understand its main problems and offer possible solutions. Therefore, protagonists of particular funeral eulogies were the professors who resulted involved in the front line in defence and support of higher education, after numerous and repeated political offices taken up at a national level, such as the statistician Giulio Salvatore Del Vecchio, who «spent his life for the improvement of Italic education»[93], or such as the doctor Pio Foà, who «was in charge of scientific questions and teaching in the high-ranking audience»[94].

Finally, a separate discussion must be made for the obituaries appeared on the pages of «L'Università Italiana» during the Fascist period. Analysing the funeral eulogies of that period, it is possible to clearly and definitely divide Mussolini's dictatorship into two distinct parts, each one characterized by specific peculiarities. The first one covers the period from the rise of the regime until the early 1930s; instead, the second one extends from 1931-1932 until the fall of the dictatorship. As already noted by Roberto Sani and Anna Ascenzi with reference to professors and school men's obituaries about Italian magisterial teaching magazines, there are no direct or indirect references to Fascism and its ideal orientations and programmatic tendencies during the first phase[95]. On the contrary, in celebrating the dead professors' memory, the

91 See *Solone Ambrosoli*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 5, n. 21, October 1st, 1906, p. 187.

92 See *Carlo Cantoni*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 5, n. 21, October 1st, 1906, p. 187. Among the supporters of free teaching, please see Prof. Ernesto Cesàro's obituary *Ernesto Cesàro*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 5, n. 21, October 1st, 1906, pp. 187-188.

93 See *Giulio Salvatore Del Vecchio*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 16, nn. 9-11, September-November 1917, pp. 93-94.

94 See *Pio Foà*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 19, nn. 8-10, October 1923, p. 124. The following obituaries are thematically very similar: *Angelo Battelli*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 15, nn. 11-12, November-December 1916, p. 184; *Michele Pietravalle*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 19, n. 5, July 1923, p. 68 and *Giovanni Battista Queirolo*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 27, n. 1, January 1931, p. 21.

95 On this regard, see Ascenzi, Sani, *«Oscuri martiri, eroi del dovere». Memoria e celebrazione*

magazine edited by Gurrieri and Albertoni revealed a surprising extraneousness and impermeability to the values and watchwords in Mussolini's regime with very rare and isolated exceptions[96], still proposing *topoi* already widely used during the first twenty years of the century and, above all, supporting an ideal of independent professor, who was not still largely standardized to the Fascist ideological scheme, in an attempt to almost recognize to universities a space of freedom and resistance to the totalitarian thoughts[97]. Therefore, the professor was still described as a «scholar and researcher of pure science, who was not interested in profit»[98], such as the pharmacologist Luigi Sabbatani, and continued to dominate the scene by virtue of «his sharp wit and fresh mind»[99], as recognized to the clinician Antonio Cardarelli; or as a «beautiful model of scientist and man of high culture»[100], qualities which were well suited to the doctor Leonardo Bianchi.

However, if the mid-thirties were identified as a watershed period for magisterial periodical publications where to find «the first generic references to Mussolini's ideology and the Fascist regime»[101] within the obituaries devoted to teachers, as regards professors' funeral eulogies, this "turning point" in a Fascist key can be traced back to 1931, the date when the first clear references to the regime introduced by the Duce began to appear in the Italian academics' funeral commemorations published in «L'Università Italiana». It is no coincidence that the jurists Giuseppe Oliva and Silvio Perozzi were worthy of praise for the «ability [of the former] to know how to evolve following the times» – this skill had earned him «the *honorary card* of the Fascist Party»[102] – and the latter was «one of the most fervent fighters of the nationalist party, who contributed to the advent of Fascism so much»[103], like the political scientist Angelo Oliviero Olivetti, «one of the most fervent Fascists», who was considered one of the

del maestro elementare attraverso i necrologi pubblicati sulle riviste didattiche e magistrali nel primo secolo dell'Italia unita (1861-1961), cit., pp. 57-71.

96 Please, see *Camillo Golgi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 22, n. 2, February 1926, p. 31.

97 Please, see Ascenzi, 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)*, cit., pp. 90-91.

98 See *Luigi Sabbatani*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 24, n. 8, August 1928, p. 138.

99 See *Antonio Cardarelli*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 23, n. 2, February 1927, p. 43.

100 See *Leonardo Bianchi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 23, n. 3, March 1927, pp. 62-63.

101 Please, see Ascenzi, 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)*, cit., pp. 67-68.

102 See *Giuseppe Oliva*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 27, n. 1, January 1931, p. 21.

103 See *Silvio Perozzi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 27, n. 2, February 1931, pp. 36-37.

most important theorists of the Fascist unionism and «corporatism»[104], and the historian of Law Raffaele Pescione, the «first admirable speaker of the Fascist party»[105].

If in the early 1930s the references to the regime within obituaries were still limited to a few and exiguous sentences included in a composition which still took care of outlining the dead professors' scientific and cultural profile as a whole[106], in the «years of consent» these references to Fascism inevitably intensified until they became wider and more full-bodied (with a detailed indication of all the institutional and political offices assigned by the regime to the dead professors) and were the most connotative elements of each funeral eulogy, with the primary goal of satisfying the Duce's repeatedly expressed desire to also assert his hegemony on the University, which has always been considered the place of training par excellence for the new ruling class and, therefore, the most attractive "prey" than ever for its neuralgic function. Even before being remembered as an affirmed doctor, the pathologist Pio Pediconi was therefore celebrated, above all, as a «hot Fascist coming from the nationalist ranks»[107]; the legal doctor Gaetano Corrado as an «admired Fascist Blackshirt on the Eve»[108], while the jurist Annibale Carena as the one who «had properly fulfilled important missions abroad better than the others, founding the Fascist University Group in Vienna […] and becoming an observer to the League of Nations as a representative of the University Groups»[109].

3. *The professorial obituaries on the columns of «Gli Annali della Università d'Italia. Rivista bimestrale dell'istruzione superiore» (1939-1943)*

The ministerial magazine «Gli Annali della Università d'Italia. Rivista bimestrale dell'istruzione superiore»[110] was born on the eve of World War II.

[104] See *Angelo Oliviero Olivetti*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 27, n. 12, December 1931, p. 210.

[105] See *Raffaele Pescione*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 28, n. 12, December 1932, p. 206.

[106] In particular, see the obituaries by *Bernardino Varisco*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 29, n. 11, November 1933, pp. 193-194 and *Antonio Garbasso*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 29, n. 4, April 1933, pp. 75-76.

[107] See *Pio Pediconi*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 30, n. 5, May 1934, p. 89.

[108] See *Gaetano Corrado*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 31, n. 3, March 1935, p. 54.

[109] See *Annibale Carena*, «L'Università Italiana. Rivista dell'istruzione superiore», vol. 31, n. 4, April 1935, p. 76.

[110] For detailed information about the genesis and development of this magazine, as well as its *mission* and editorial structure, please also refer to Pomante, *L'Università italiana nel Novecento. Nuovi itinerari storiografici e inediti percorsi di ricerca*, cit.

Uninterruptedly edited in Rome from October 29th, 1939, to September 1st, 1943, and directed by Giuseppe Giustini, senior official of the Ministry of Public Education, the new periodical publication had been strongly desired by Minerva owner, Giuseppe Bottai, who intended to use it as a useful and valuable tool to carry out his «university revolution» project of higher education in a Fascist key[111].

Of course, contrary to what was found for the other magazines already analysed, on the pages of «Gli Annali della Università d'Italia», there were also professors' obituaries who were not, however, included in a specific column devoted to funeral eulogies, but within a wider section of the periodical with the title «Le opere e i giorni» in the second part of each issue of the magazine, which offered a real general «overview» about the daily life of universities and their professors and learners, so that the «memories» of such events and men «are not dissipated and lost»[112].

During the four years when the periodical was published, on the columns of «Gli Annali della Università d'Italia» there were about forty obituaries of variable length, which were all equally characterized by the use of a redundant linguistic register and a typically Fascist stylistic rhetoric, where the editorial board intended to pay «rightful» respects to dead professors who had contributed to increase «the Italian glory and primacy of the Fascist regime» thanks to their «inexhaustible thirst for knowledge», «quick and alert spirit» and «recognized international relevance of their work»[113].

The ideal of a professor, who was celebrated and praised, was obviously the one who perfectly embodied the Fascist model of a «living and active man»[114] voted by innate nature to a «busy and fruitful life»[115] and was, therefore, «all action, bravery and discipline», a real «militant of culture and science» committed to the redemption and training of the new fully Fascist ruling classes. Therefore, besides a «valuable professor and scientist»[116], such as the chemist Mario Betti, or a «remarkable model of scientist, […] endowed with high intellect and fervent Fascist faith, […] who has devoted his passionate and enlightened activity to study for forty-three years»[117], such as the doctor Oddo Casagrandi,

111 About this topic, please see Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, cit.

112 See *Le opere e i giorni*, «Gli Annali della Università d'Italia», cit. About this column, please see what is reported in the second chapter of this work.

113 See L.L., *In memoria di Ulisse Gobbi*, «Gli Annali della Università d'Italia», vol. 2, n. 1, October 29th, 1940, pp. 83-84.

114 See A. Cazzaniga, *Alberto Pepere*, «Gli Annali della Università d'Italia», vol. 2, n. 1, October 29th, 1940, pp. 81-83.

115 See G. Quagliariello, *Filippo Bottazzi*, «Gli Annali della Università d'Italia», vol. 3, n. 1, October 29th, 1941, pp. 67-68.

116 See *Mario Betti*, «Gli Annali della Università d'Italia», vol. 3, n. 5, June 29th, 1942, pp. 405-406.

117 See *La scomparsa di due Maestri*, «Gli Annali della Università d'Italia», vol. 4, n. 3, February 28th, 1943, pp. 223-224.

there were other "heroic" characters, such as the historian and former Minister of Public Education Pietro Fedele, remembered for «his uncommon attitudes» as a «wise professor, who was free with advice, instructions, affectionate and active encouragement» and always supported by the «great gifts of His mind which designated him to a high responsibility for Government and it is right to remember it with heartfelt and grateful thoughts»[118]; or such as the «most intelligent and brilliant investigator» Federico Millosevich, a «supreme mineralogist» who «has highly honoured Italian School and Science with his uninterrupted activity as a professor and scholar for forty years»[119].

What inevitably linked all the dead professors, who were honoured on the pages of the magazine edited by Giustini, was especially their strong bond with the Fascist regime and the ideals it advocated, as well as the attitude of total reverence towards the Duce. Therefore, the «lively Italian feeling»[120] found in the jurist Luigi Rossi went well together with «the high honour and satisfaction of being chosen by the Duce to erect the new Tuscolo National Observatory» which had inspired the last years of a «Glory of Italian astronomy»[121], such as Emilio Bianchi; while the scientific skills and «civic and family virtues» of the full professor of Hydraulics Gaudenzio Fantoli, «interventionist in 1915 and member of Mussolini's movement since 1916», as well as an «energetic and very active man, who was unable to bear restrictions on his exuberant vitality», were certainly worthy of being handed down «to the venture generations […] as an example and incentive to do well for science and country»[122].

An eviscerated love of country, «elected civil and military virtues [to be put] at the Italian service»[123], such as in the case of the surgical clinician Giuseppe Tusini or the full professor of English literature Ernesto Longobardi[124], and especially the belligerent choice made by the Duce in those months undoubtedly represented further elements which were worthy of praise and very recurrent in the obituaries appeared on the pages of «Gli Annali della Università d'Italia». In this sense, the clinician Edoardo Maragliano's funeral eulogy appears to us emblematic because he probably seemed to perfectly embody the ideal model of a professor as an essential guide and example for all the future generations

118 See *Pietro Fedele*, «Gli Annali della Università d'Italia», vol. 4, n. 3, February 28th, 1943, pp. 218-220.

119 See *Federico Millosevich*, «Gli Annali della Università d'Italia», vol. 4, n. 2, December 29th, 1942, pp. 133-134.

120 See *Luigi Rossi*, «Gli Annali della Università d'Italia», vol. 3, n. 2, December 29th, 1941, pp. 173-174.

121 See G. Abetti, *Emilio Bianchi*, «Gli Annali della Università d'Italia», vol. 3, n. 1, October 29th, 1941, pp. 65-67.

122 See *La scomparsa di un Maestro insigne: Gaudenzio Fantoli*, «Gli Annali della Università d'Italia», vol. 1, n. 3, February 29th, 1940, p. 327.

123 See *Un altro Maestro scomparso!*, «Gli Annali della Università d'Italia», vol. 1, n. 6, August 29th, 1940, p. 614.

124 See *La scomparsa di un Maestro*, «Gli Annali della Università d'Italia», vol. 4, n. 4, April 29th, 1943, p. 297.

of real Fascist academics, as it was in Benito Mussolini's mind and intentions. The inventor and creator of the first anti-tuberculosis vaccination, who was able of «associating the ideals of science with social defence and recovery of lineage» and to whom «Italy and the world had paid […] the most deserved expressions of recognition for his mind and enlightened industriousness», had «actively participated in the preparation of the Great War with a memorable speech in Parliament as the organizer of Military Health». All this prompted the drawer of the obituary to assert that

> if his precious life had been still somewhat prolonged, he would still undoubtedly have found the strength and enthusiasm to pronounce a word of incitement and faith in the new war for the Italian national and imperial claims, despite his age[125].

4. *The professors' obituaries in the periodical publications during the early Republican Italy (1946-1960)*

In the first phase of the new-born Italian Republic, the professors' periodical publications found their greatest expression in two magazines which have almost continuously dealt with the needs of the Italian academic world for fifteen years, aiming at intercepting and satisfying the professors' cultural, moral and intellectual needs and solicitations and protecting the economic-legal interests of the teaching category in a particularly delicate historical phase of the country, after the exhausting Fascist twenty years and the tragic period of the World War II. We refer to the above-mentioned periodicals «L'Università italiana. Quindicinale di informazioni universitarie», published in Rome from 1946 to 1949 and first edited by Prof. Giuseppe Caronia, rector of the Capitoline University, and then by Dr. Nicolò Spano, administrative director of the same university and inspirer of the magazine since its foundation in truth, and «Il Giornale dell'Università. Organo degli atenei d'Italia», which was published in Florence from 1951 to 1960 and whose edition was entrusted to the historian of Philosophy Eustachio Paolo Lamanna[126].

Even the pages of these two publications, which represented the official communication tool for ANPUR [Associazione Nazionale dei Professori Universitari di Ruolo (National Association of Ordinary Professors)], had a lot of professors' obituaries and, even if their funeral eulogies sometimes had very different contents and structures, both periodicals ended up obeying specific

125 See *La scomparsa di un grande Maestro*, «Gli Annali della Università d'Italia», vol. 1, n. 6, August 29th, 1940, pp. 613-614.

126 About these two magazines, please see Pomante, *L'Università italiana nel Novecento. Nuovi itinerari storiografici e inediti percorsi di ricerca*, cit.

and common ideological and editorial requests, which were only the fruit of the historical period when they were published.

First of all, the first instance was the one related to a widespread desire to celebrate the Resistance and the war of liberation and, more particularly, to enhance the example provided by those professors who had courageously resisted the Fascist persecutions and had fought against the physical and moral vexations and abuses of the regime, in defence of national freedom. Instead, the second instance was certainly connected to the equally appreciable need to define an ideal profile of an academic as soon as possible, who was completely free from the stereotypes created by the Fascist propaganda on the one hand, and already sensitive to the perspectives of the emerging democratic society on the other hand. Finally, in the late 1940s, even a third instance strongly spread and was represented by the need, perceived by many people and closely linked to the renewal process of Italian Schools and Universities which was launched by the Minister of Public Education Guido Gonella in a democratic sense, to give the professor a direct and absolutely relevant role in the desired structural and didactic reform of the entire Italian educational system.

More specifically, in the columns of «L'Università italiana», where over one hundred funeral compositions were published[127], ranging from the synthetic and essential indications of the dead's biographical data to wide literary celebrations, an attempt was mainly made to satisfy the first two instances, without also neglecting the third one in some obituaries.

Therefore, «a completely exceptional figure in contemporary culture», such as the mathematician Federico Enriques, who was born in a Jewish family of Portuguese origins, was primarily celebrated for the persecutions suffered during Mussolini's regime, to which he however opposed an admirable strength of mind.

> His obituary stated: - In 1938, he was dismissed from teaching for racial measures; but he bore this painful period of his life with serenity, continuing to wait for scientific research with unchanged fervour. In 1944, he was re-instated in the chair to the great joy of all his countless admirers and devoted disciples[128].

Other obituaries are along the same lines, such as the one devoted to the doctor Mario Donati, who was considered the most prestigious Italian surgeon between the two wars and his origins were Jewish: for this reason, «he was iniquitously persecuted by the Fascist regime, despite the evil which already undermined him in those years»[129]; the Islamist and Arabicist Michelangelo

[127] During the four years of the periodical's life, the title of the column with the obituaries changed its name several times. In fact, there were often titles, such as «Notiziario dei professori», «Lutti» and «Nostri Lutti», even in a confused way at a chronological level.

[128] See *Federico Enriques*, «L'Università italiana. Quindicinale di informazioni universitarie», vol. 3, n. 6, June 15th, 1946, pp. 4-5.

[129] See *Lutti. Mario Donati*, «L'Università italiana. Quindicinale di informazioni universitarie»,

Guidi, «one of the most accomplished model of humanist, in the highest sense of the word», who knew how to oppose the regime's arrogance to «a spirit of seriousness, dignity and measure which clearly differentiated him [from the others] during the Fascist era»[130]; or the jurist Giovanni Lombardi who, «after being forced to abandon teaching following his refusal to take an oath of allegiance to the Fascist regime […] and being arrested in Naples for Anti-Fascism», continued to strenuously fight the Duce and his ideas «both with the word and his books, starting with Matteotti's commemoration»[131].

If the doctor and pharmacologist Federico Nitti deserved the epithet of a «hero of science» and a «medal for the Resistance», because he had produced penicillin, «refusing to reveal its formula to German people, despite the threat of deportation»[132], real illustrious victims of the regime's persecutions, but also convinced supporters of the Resistance and the war of liberation were, above all, the historian of Philosophy Guido De Ruggiero and the full professor of Italian Literature Achille Pellizzari who, therefore, were considered as a symbol of an Italian academy which had to be ontologically configured Anti-Fascist both from an ideological and cultural point of view. However, in addition to best embodying the partisan ideals which had allowed Italy to free itself from the Nazi-Fascist yoke, both of them also seemed to satisfy the above-mentioned request to define the profile of a professor, who was well connected to new libertarian and democratic ideals, and the most ambitious instance to outline a model of professor, who was also actively involved in the renewal of the entire system of higher education as a whole, thanks to their courageous life experience and concrete action in the Italian university and political world in the 1940s (as known, among numerous positions, De Ruggiero was also the Minister of Public Education during the Bonomi II Cabinet in 1944[133]; instead, Pellizzari was ANPUR president and deputy for Christian Democracy at the Constituent Assembly).

For example, Achille Pellizzari, a man who «knew how to reconcile love of knowledge and teaching with practical activity, carried out without limits

vol. 3, n. 3, May 1st, 1946, p. 8.

130 See G. Levi Della Vita, *Michelangelo Guidi*, «L'Università italiana. Quindicinale di informazioni universitarie», vol. 3, n. 6, June 15th, 1946, p. 5.

131 See *Lutti. Giovanni Lombardi*, See *Federico Enriques*, «L'Università italiana. Quindicinale di informazioni universitarie», vol. 3, n. 16, November 15th, 1946, p. 6.

132 See *Lutti. Federico Nitti*, «L'Università italiana. Quindicinale di informazioni universitarie», vol. 4, n. 2, June 1st, 1947, p. 6.

133 Guido De Ruggiero was Minister of National Education from June 18th to December 12th 1944 during the Bonomi II Cabinet. About his work as the office holder of this ministry, please see his valid bio-bibliographic profile by R. De Felice, *De Ruggiero, Guido*, in *Dizionario Biografico degli Italiani*, Rome, Istituto della Enciclopedia Italiana, 1991, Vol. 39, pp. 248-258, but also the most recent and interesting work edited by C. Genna, *Guido De Ruggiero e La nuova Europa: tra idealismo e storicismo*, Milan, FrancoAngeli, 2010.

of sacrifices for the purpose of rehabilitating those human values war had dimmed», was the one who

did not adhere to the so-called regime and, after the Aventino episode, of which he was one of the main supporters, he retired to private life, refusing any flattery by those who should have praised his name among the greatest 'laudatores ducis';

however,

for twenty years he has kept the torch for freedom alive, without forgetting a reason to express his aversion to coercion of will, unification of conscience and enslavement of culture.

As a staunch supporter of the Resistance, he lived the tiring and difficult months of the Liberation, proposing to his battle companions «His courage, heedless of the danger, resistance to the hardships of cold and hunger, faith and lifestyle» as an example to be followed and telling more about his experience as a protagonist on four printed pages, which are still «now a rare and sublime document of the partisan struggle in Italy».

After the liberation, he resumed his political activity, especially devoting his time and attention to the protection and improvement of the economic-juridical conditions of the Italian teaching class, who also needed a «moral and scientific regeneration», and the attempt to reorganize the Italian university, which was destroyed and devastated by the anguished war years. He tried to contribute to this work of rebirth, rising to an admirable «Master of Science» in

being a man in the highest and the most complete sense, a real builder at a political and social level, […] a great champion of freedom, [and] a rare example of balance between the attitudes to abstract research and practical achievements, between love for indeterminateness and the alert sense of immediateness and contingency[134].

The intent to sketch out a new model of intellectual, who was alien to the ideals which had characterized the Fascist period, willing to act at the University in the new and complex season starting in Italy with the advent of the Republic and especially decided to constantly involve himself in favour of the affirmation of new democratic values and in support of the reform and development of higher education, also animated the obituaries appeared on the pages of «Il Giornale dell'Università», the full professors' official voice in the 1950s. All the thirteen funeral eulogies published since 1952, included within a variously called column («Notiziario», «Necrologio» or «Necrologi») and usually written by privileged students or close friends of dead professors, appear to be very accurate from a stylistic and linguistic point of view and, if analysed as an overall *corpus*, they contribute to bring out the overall picture of a circle of

134 See A. Capocaccia, *In memoria di Achille Pellizzari*, «L'Università italiana. Quindicinale degli atenei d'Italia», vol. 5, n. 7, April 15th, 1948, pp. 85-86.

professors, scientifically appreciated and linked together by strong principles and common values, who were called to a real civil, cultural and political mission aimed at educating young people and, above all, the new ruling class who would have drawn its vital sap from the lecture rooms.

In this way, people such as the man of letters Enrico Carrara, «who was unable to lie to himself and in front of other people and […] to openly profess his beliefs even in the face of Fascism»; or men endowed with «fervent mind»[135] and «recognized moral height and absolutely honest character»[136], such as the mathematicians Filadelfo Insolera and Guido Castelnuovo; or a «great lord measured in deeds and words, armed with a well-tried probity and righteousness», such as the professor of Greek and Latin Grammar, Enrico Bianchi, a happy expression of a «generation almost completely disappeared […] from life, not from memory»[137], undoubtedly offered the happy ethical solution to be contrasted with that value system developed during Fascism, which was characterized by arrogance, corruption, pusillanimity, as well as a modest mental openness in a degenerative way.

Therefore, the moral, ideological and, last but not least, cultural framework, which was erected during Fascism and now inevitably needed to be replaced by the new republican "structure", obviously still a work in progress, had to be definitively demolished. In this courageous and demanding work, a fundamental role would have been obviously played by University and its main actors, the professors who, in order to carry out their enterprise, should have learnt a lesson precisely from the edifying life conduct of some illustrious dead colleagues, who were illuminated «by the most solid intellectual and moral qualities».

So, in the magazine edited by Lamanna, there was the publication of particularly intense obituaries from an emotional point of view, such as the ones destined to commemorate «a truly superior man», such as the physicist Alfredo Pochettino, «honest to the point of scruples and beyond scruples […] and not conformist enough to submit to all the Fascist orders and whoppers»[138], or the ones which aimed at enhancing recognized «moral and intellectual excellent people», such as the jurist Alessandro Levi who was endowed with «civil courage» and «changed neither thought nor action and continued to give an example of life, without ostentation», despite having seen «the face of the dominant tyrant […]». Therefore, this philosopher of Venetian law just seemed

135 See C.B., *Filadelfo Insolera*, «Il Giornale dell'Università», vol. 6, n. 2, March-April 1956, p. 67.

136 See L. Camp, *Guido Castelnuovo*, «Il Giornale dell'Università», vol. 2, nn. 5-6, May 15th – June 15th 1952, p. 106.

137 See N. Terzaghi, *Enrico Bianchi*, «Il Giornale dell'Università», vol. 3, nn. 3-4, March 15th - April 15th, 1953, p. 80. It is also very similar to U.E. Paoli, *Ettore Bignone*, «Il Giornale dell'Università», vol. 3, nn. 7-8, July 15th – August 15th, 1953, pp. 140-141.

138 See N. Terzaghi, *Alfredo Pochettino*, «Il Giornale dell'Università», vol. 3, nn. 7-8, July 15th – August 15th, 1953, p. 142.

to personify an «exquisite teacher of doctrine and life»[139], the ideal model of a republican professor to whom the whole academy – young professors *in primis* – should have been inspired.

He suffered political persecution for loyalty to his ideas. He was expelled from teaching in 1938 after racial laws. And from 1943 to 1945 he had to go into exile to Switzerland. On no occasion did he ever fail to follow the principles of tolerance, human understanding, indulgence, to which he had inspired his life with deep conviction. Even in times of unjust persecution, no one has ever heard words of recrimination or resentment from him. His life and thoughts were traversed by a vein of optimism which made him continually active in his studies and civil life, actively confident in the ideals of justice and freedom, fervent, loyal and helpful in human relationships[140].

Finally, the funeral eulogy of Rodolfo Ambrosino, a brilliant professor of Institutions of Roman Law and a very young rector at the University of Trieste[141], who prematurely died at the age of 48, can be also considered interesting and particularly significant for the purposes of our topic. As the spokesman for the entire teaching category of the republican age and a firm supporter of the principle by which «the reasons of the Nation can be only defended with the daily activity aimed at protecting the interests of high culture», ANPUR honorary president had strongly fought for the idea that «the renewed Italy wanted to be itself, with dignity and modesty, in fidelity to the ideals of freedom and universality of the national Risorgimento». Therefore, Ambrosino's action, like the one of each professor who was also responsibly invested with institutional assignments, had been always characterized by an intense scientific activity, a certain administrative familiarity, as well as an admirable organization of «innumerable meritorious educational and cultural initiatives», without neglecting the

far-sighted consciousness of a humanist who was aware of modern University needs and always concerned with harmoniously blending the intangible respect for tradition with the needs of a fickle and restless contemporary reality[142].

139 See E. Finzi, *Alessandro Levi*, «Il Giornale dell'Università», vol. 4, nn. 1-2, January-February 1954, pp. 35-36.

140 See N. Bobbio, *Alessandro Levi*, «Il Giornale dell'Università», vol. 4, nn. 1-2, January-February 1954, pp. 36-38. There were two obituaries about Levi, one by Finzi and one by Bobbio.

141 In fact, he became rector at the University of Trieste in June 1952 at the age of 42 and held this position until June 1958, when he prematurely died.

142 See P. Piovani, *Rodolfo Ambrosino*, «Il Giornale dell'Università», vol. 8, nn. 5-6, September-October 1958, pp. 159-160.

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Marcus Tullius Cicero's concept of education through culture*

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ABSTRACT: The article analyzes Mark Tullius Cicero's speeches, writings and letters of different years, in which he touches upon the issues of education through culture in the educational space of the ancient city. Expressing his opinion on the theatre, poetry and art (in the broad sense of the word, including the art of living and the art of speech), Cicero not only emphasized the educational power of culture, but also pointed to its educational weakness, which takes place if the functions of culture are reduced to mere entertainment.

EET/TEE KEYWORDS: Education through culture; Educational space; Ancient city; Cicero's heritage; Ancient Roman pedagogy; First century BC.

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Introduction

Problems of the interaction between education and culture, raised in the writings of classical thinkers at different periods of ancient history, are indeed supertemporal. They were relevant for Cicero and his contemporaries, who advocated the ideal of a «virtuous man» («vir bonus»), and continue to be central to modern researchers. The educational ideal, viewed through the prism of the complexities and opportunities for education through culture, undergoes inevitable changes in each historical period. The «ideal nature» of any ideal is constantly questioned, considered and reconsidered from the perspective of proper behavior of an individual who dwells in a particular educational space of a particular culture.

The idea of the importance of education through culture was inherent to Cicero's philosophy throughout his career as an orator, philosopher and politician and revealed itself in his writings, speeches and letters to his contemporaries, friends and relatives. Cicero introduced the concept of the author («auctor») in the very Latin meaning of this word; etymologically connected with the verb «augeo», it assumed that someone was able to «enlarge» or «augment» something, and also vouch for what he did. This is what Charles Louis Montesquieu pointed at in «Discourse on Cicero» when he admired Cicero's ability to be an author who deeply felt his epoch and its people, «He does not give precepts; but he makes them felt. He does not exhort to virtue; but he attracts to it»[1].

Numerous attempts to assess Cicero and his legacy, of course, took place both before and after Montesquieu. Montesquieu's definition attracted our attention because the philosopher points to Cicero as the author of the texts which are not only complex and contradictory, but are connected with the pedagogical culture in a complex and contradictory way. Despite the ever-increasing number of research works, the sociocultural identification of Cicero's pedagogical heritage is a subject whose multifacetedness is still not fully recognized by the researchers. Cicero in many ways and in many respects was a «model» and «a conveyor of models»[2], thus predetermining the development of the western pedagogical tradition and associating it with the phrase «humane pedagogy»[3]. While rebuking those who are not educated («*sine humanitate*»), Cicero stresses

[1] Ch.-L. Montesquieu, *Discourse on Cicero*, trans. D. Fott, «Political Theory», vol. 30, n. 5, 2002, p. 734.

[2] W.J. Nicgorski, *Cicero on Education: The Humanizing Arts*, «Arts of Liberty Journal», vol. 1, n. 1, 2013, pp. 1-25.

[3] See: M. Zerba, *The Frauds of Humanism: Cicero, Machiavelli, and the Rhetoric of Imposture*, «Rhetorica: A Journal of the History of Rhetoric», vol. 22, n. 3, 2004, pp. 215-240; Ch. Hogel, *The Human and the Humane: Humanity as Argument from Cicero to Erasmus (Reflections on (In) humanity)*, V&R Academic, National Taiwan University Press, 2015; M. Kato, *Significance of the rhetorical and humanistic tradition for education today*, «Asia Pacific Education Review», vol. 15, n. 1, 2014, pp. 55-63; R. Oniga, *L'idea latina di HUMANITAS*, in *Contro la post-religione. Per*

that it is necessary to strive for virtue and to feel righteously proud when it is achieved. For Cicero, virtue was a special kind of inculturation, since it was achieved only by those who sought not to lose, but to find themselves in culture through education relevant to the human nature.

1. *The educational ideal of educating through culture: the theory of Cicero-politician*

In 59 BC Cicero writes a long letter to his brother Quintus, who was appointed to govern one of the Roman provinces in Asia. He appeals to Plato, who once claimed that civitate – states – become happy if they are ruled by «educated and wise people» or people who have never neglected science and philosophy. It seemed to Cicero that the combination of power and wisdom which Plato pointed to can be observed in Quintus' province since he has spent the chief part of his zeal and time trying to implement the principles of philosophy, virtue, and humanity (Cic. Q. fr. I.1. X.29)[4].

Cicero encourages Quintus to stop complaining that Asia has distanced him from Rome: this province has become happy, bestowed honours on him, which few could gain, and therefore one should demonstrate «greater care» towards it. Cicero precedes his reasoning with the idea that it is necessary to constantly remember those who have brought people out of barbarism (Cic. Q. fr. I.1. IX.28)[5]. Cicero is trying to convey to Quintus the idea that he should govern in such a way that people could say about him, «Deservedly weighty, then, was his influence, since all men united in his praise» (Cic. Sen. XVII.61)[6].

The year of writing this letter was the first year of Caesar's consulate as well, and Caesar also ought to have demonstrated «greater care» about Rome. In this letter, Cicero is trying to admonish impulsive and often short-sighted Quintus, whose power, like Caesar's, wasn't always combined with wisdom. In Cicero's opinion, a person is only then receptive to «virtue and humanism» when he realizes the power of the educational influence of culture. As for Caesar, Cicero had no illusions about him: the consul certainly wasn't that kind of a man.

un nuovo umanesimo Cristiano, Verona, Fede & Cultura, 2009, pp. 1-16; R.R. Wellman, Cicero: *Education for Humanitas*, «Harvard *Educational* Review», vol. 35, n. 3, 1965, pp. 349-362.

[4] M. Tullius Cicero, *Letters to and from Quintus*, in L.C. Purser (ed.), <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi058.perseus-lat1:1.1.29> (last access: 08.12.2018).

[5] *Ibid*., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi058.perseus-lat1:1.1.28> (last access: 08.12.2018).

[6] Cicero, *De Senectute. De Amicitia. De Divinatione*, with an English translation, Cambridge, Harvard University Press, 1923 <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi051.perseus-eng1:61> (last access: 10.12.2018).

In earlier letters to friends and relatives (54 BC and 45-44 BC), Cicero borrows or paraphrases excerpts from the moralizing poet Catullus, who vehemently attacked Caesar in a cycle of poems. Caesar considered himself forever disgraced by Catullus's poems, where the poet directly says that Caesar is not distinguished by intelligence and is destroying Rome. Catullus compares Caesar with Pompey and concludes that both of them have done a lot for Rome as a cultural capital by decorating it with theatres (Pompey) and entertaining citizens with magnificent spectacles (Caesar). However, they were very far from the ideal of a «virtuous man» («vir bonus») who are truly receptive of culture and eager to connect with it.

The politician, according to Cicero, should, first of all, try to turn Rome into a model union of highly cultured people, and not just formally carry culture to the masses. Caesar's friends and relatives were not among those who could politically admonish him, as Cicero did to his brother Quintus. Cicero wanted not only to reform «the political culture at Rome, which he saw veering dangerously from the ideals of the traditional patriotism toward the kind of egotistical quest for glory and self-aggrandizement»[7]. He strove to point out to his compatriots the need to rethink the relationship among politics, education and culture. As depicted by Catullus, impudent («inpudicus»), voracious («vorax») and prodigally venturous («aleo») adulterer («adultery») Caesar has nothing in common with the ideal statesman, educated in the best traditions of the Greek culture, about whom Cicero writes to his brother Quintus. All those insults, with which Catullus so generously showers Caesar as a man, mask his attitude to Caesar as a politician, «Study I not o'ermuch to please thee (Caesar!) and court thee, Nor do I care e'en to know an thou be white or be black»[8].

This sharp offensive attack against the inappropriate, which was demonstrated by Catullus, was much more than just an effective artistic technique. The first-century BC res publica was apodictic; it vehemently rejected everything old in favour of the new. Wooten points out that Cicero, like Demosthenes, portrayed himself as a man of destiny, struggling valiantly against evil and corruption for traditional ideals[9]. In Cicero's opinion, not only did not the old Roman educational ideal deserve to be rejected, but it also demanded the restoration of its rights, which was possible if the attitude to the Greek education and culture was reconsidered[10]. The Roman elite was well familiar with Greek intellectual

[7] J.P. Zarecki, *Cicero's ideal statesman in theory and practice*, Doctoral Thesis, University of Florida, 2005, p. 39.

[8] C. Valerius Catullus, *Carmina*, Sir Richard Francis Burton (ed.), <http://data.perseus.org/citations/urn:cts:latinLit:phi0472.phi001.perseus-eng1:93> (last access: 10.12.2018).

[9] C.W. Wooten, *Cicero's Philippics and Their Demosthenic Model*, Chapel Hill, University of North Carolina Press, 1983, p. 16.

[10] See, A. Corbeill, *Education in the Roman Republic: creating traditions*, in Y.L. Too (ed.), *Education in Greek and Roman antiquity*, Leiden, Brill, 2001, pp. 261-287; H. Guite, *Cicero's Attitude to the Greeks*, «Greece & Rome, Second Series», vol. 9, n. 2, 1962, pp. 142-159.

achievements but little were they mentioned where they could have a broad socio-political resonance. In many of his works and speeches for the defense, Cicero suggests that his countrymen should honestly admit that most of them do not want either to condemn the Greek culture or pretend they know nothing of it. Cicero presents the Greek culture «as the medium through which Roman nobles found relief from the strictures placed upon their conduct by the weight of their peers' judgment»[11], as a freedom which was more used in the provinces than in Rome[12].

Cicero clearly states that educated Romans, including himself, are forced to demonstrate an ambivalent attitude towards all Greek and conceal their Greek education[13]. His theory of educating through culture intrinsically combines classical Greek pedagogical ideas and political programs, reveals the unique features of Roman mindset and universal moral principles developed by the previous epochs and cultures. The origins of this complex and surprising combination are connected, among other things, with Cicero's political ambitions. Let us give just one example. A representative of the municipal aristocracy Gaius Sallustius Crispus presented his political program in 51-50 BC. It was called «The First Letter to Caesar», and there he insisted that the Senate should be given the supreme power, since the public were not capable of governing the state. At approximately the same time (54 BC), Cicero, who was in favor of the aristocratic republic, appears with the essay «On the commonwealth» («De re publica»), where he exposes another political program based on two slogans: «the concord of the orders» («oncordia ordinum») and «the unity of all good people» («consensus bonorum omnium»)[14]. In «De re publica», relying on Plato's «Res publica», Cicero states that the supreme power will feel much better if the public realize their mission in governing the state. Both Sallustius and Cicero understand «the public» in the same way – it is a middle class friendly to the authorities. However, unlike Sallustius' one, Cicero's program is not exclusively political; it has a sociocultural focus and is aimed at reconsidering the role of education in preserving the stability of the state.

Both for Cicero and Plato, the focal point was how far the real state in which we look for the means of educating the ideal citizen in the cultural space of the city is from the ideal state to which we aspire. The state will become

11 M.W. Becker, *Greek Culture and the Ideology of Roman Empire in Cicero's Verrine Orations*, Doctoral Thesis, Princeton University, 1996, p. 134.

12 In a letter to Quintus, Cicero speaks exactly about this: the desire of influential Romans in the provinces to dominate the Greek culture will not lead to anything good. And every educated person who has entered the political arena should realize this.

13 C.B. Bishop, *Greek scholarship and interpretation in the works of Cicero*, Doctoral Thesis, University of Pennsylvania, 2011, p. 14.

14 The political views of Sallustius influenced the above-mentioned Catullus and his circle, but the poet's closest friends openly supported Cicero and joined his political struggle against Caesar.

ideal if the society strives to become ideal and cultivates the best in itself[15], i.e. uses laws to, among other things, absorb the culture in all its manifestations. The civic education of «De re publica» has more «as its primary purpose to persuade the young men that political activity is worth»[16]. He wants to draw a certain pedagogical circle within a particular culture: politicians educate young citizens through their speeches, deeds, and especially through laws, so that they eventually become politicians and reiterate, among other things, this particular way[17]. Cicero agrees with Plato, that the ideal state emerges due to the politicians who combine power and wisdom and is preserved through culture, education and laws. However, the apparent closeness of Plato's «Res publica» and Cicero's «De re publica» is deceptive. Plato expresses confidence that the ideal state will be immortal only if it has originally been well organized (with good education, people will become good). But Cicero does not want to discount «human failings which can undermine even the best-designed system»[18] (with good education, there are more chances that people will decide on the good). Agreeing with Plato that education is the basis of the state stability, Cicero considers education to be more dependent on the culture, which grows by virtue of education.

2. *Education through poetry and theatre: Cicero's Greco-Roman cultural synthesis*

Cicero's increased attention to the issues of education through culture stems largely from his desire to comprehend the problem of the formation and development of Roman intellectual and cultural tradition, for which «the Greek samples» were both crucial and dangerous[19]. Forced to recognize Romans as disciples of the Greeks in education and culture, Cicero, like all his fellow citizens, was burdened by this discipleship and tried to point out some ways to overcome it. For Cicero, poetry, theatre, art and all that we now call «objects of cultural heritage» combined into an area in which he showed considerable pedagogical

[15] M.C. Nussbaum, *Duties of justice, duties of material aid: Cicero's problematic legacy*, «Journal of Political Philosophy», vol. 8, 2000, pp. 176-206.

[16] J.J. Barlow, *The Education of Statesmen in Cicero's De Republica*, «Polity», vol. 19, n. 3, 1987, p. 374.

[17] E. Asmis, *A New Kind of Model: Cicero's Roman Constitution in De republica*, «American Journal of Philology», vol. 126, n. 3, 2005, pp. 377-416.

[18] R.W. Maass, *Political Society and Cicero's Ideal State*, «Historical Methods: A Journal of Quantitative and Interdisciplinary History», vol. 45, n. 2, 2012, pp. 87.

[19] See: Becker, *Greek Culture and the Ideology of Roman Empire in Cicero's Verrine Orations*, cit.; S. Cole, *Cicero, Ennius, and the Concept of Apotheosis at Rome*, «Arethusa», vol. 39, n. 3, 2006, pp. 531-548; J.A. Howley, *"Heus tu, rhetorisce": Gellius, Cicero, Plutarch, and Roman Study Abroad*, in *Roman rule in Greek and Latin Writing*, Leiden-Boston, Brill, 2014, pp. 163-192.

interest. Cicero's reasoning indicates the need for a clear understanding of not only the educational force, but also the educational weakness of culture, if it is reduced to feasting one's eyes on luxury goods, skimming poetry and avidly enjoying third-rate shows that satiated his contemporary theatre.

For Cicero, poetry and its translation into theatre were those things which allowed one to understand the peculiarities of education through culture. Cicero was not always positive about the theatre and its educational resources, but he considered it a necessary space for the city to conduct an open dialogue on pressing issues. In Cicero's writings, his arguments about poetry and theatre, in which the oral and written word are miraculously entailed, are hinged on three key questions: 1) What is the educational potential of the word-fiction pronounced from the stage? 2) How important is the language in which this word is pronounced - Greek or Latin? 3) What is the price of this word (both literally and figuratively)?

Cicero's ambivalent attitude to the theatre resulted largely from the phenomena that surrounded him. Theatrical productions, once fascinating for the Greeks, were not always understandable to the Romans, who preferred gambling. In ancient Roman cities, spectacles of a different kind were more popular: gladiatorial battles, circus performances, chariot races, mimes and pantomimes. The Roman intellectual class paid much attention to the theatre, organizing small theatrical performances in their homes, which were followed by a discussion of the latest poetic and musical pieces. However, a deep love for the theatre and understanding of it as a special place where you can raise your educational level were still alien to the Romans. Changes in spectators' taste preferences changed the theatre space, as indicated by the classical Roman rhetor Quintilian:

> To say nothing of the language of the uneducated, we are all of us well aware that whole theatres and the entire crowd of spectators will often commit barbarisms in the cries which they utter as one man (Quint. Instit. Or. I.6.45)[20].

Despite the fact that Quintilian condemns the extremes and talks only about his contemporary spectator, the Roman theatre cannot be called a Greek-style theatre. There was a different actualization of the oral word and its educational potential was different. Cicero could not ignore that issue since he was a man who made himself a name for the ability to foreground the significance of the word for all those who claim to be called educated people.

The origins of Shakespeare's famous phrase that the whole world is a theatre are traditionally found in the classical Roman writer and poet Petronius (27-66), who expressed the following idea in the middle of the first century AD,

[20] Quintilian, with an English Translation, Cambridge, Harvard University Press, 1920 <http://data.perseus.org/citations/urn:cts:latinLit:phi1002.phi0011.perseus-eng1:6.45> (last access: 07.12.2018).

«Mundus universus exercet histrionam» («All humanity practices the art of acting») (Ioan. Saresb. Policrat. III. 8). However, a similar idea was expressed much earlier by Cicero, who argued in the treatise «On the Ends of Good and Evil» on the ability of a person to endure hardships and sufferings:

> […] while those of medium intensity lie within our control: we can bear them if they are endurable, or if they are not, we may serenely quit life's theatre, when the play has ceased to please us (Cic. De F. I.XV. 49)[21].

Cicero compares the human life with the theatre in a context that is very different from the contexts of Petronius and Shakespeare. It is important for Cicero to explain the following: a man of spirit understands that the hardest times end in death, one should not grieve about the slings and arrows of life, and somewhere in between these two poles there is our life domain – an area where we are active spectators, but not actors, as Petronius and Shakespeare consider.

In many his works, Cicero calls the theatre a fiction space which seldom can guide the citizen. This statement is followed by a detailed explanation of such kind of "shame": the comic censure of those who have done harm the state should be expressed by censors, not by poets; ridiculing those who have done good to the state is harmful to the state system. The speech put into Scipio's mouth is crowned with the reference to the Twelve Tables, where the ancient Romans far-sightedly labeled composing and performing disgracing songs a crime and inflicted death penalty for that. Cicero defines the comedy as a mirror of human habits, but, nevertheless, believes that the assessment of human deeds should be given not in the theatre, but in court. It does not bother him that comedies denounce violators of moral rather than legislative regulations[22]. However, he still did not deny the pedagogical power of the theatre over the audience:

> What shouts recently rang through the entire theatre during the performance of the new play, written by my guest and friend, Marcus Pacuvius […] The people in the audience rose to their feet and cheered this incident in fiction; what, think we, would they have done had it occurred in real life? In this case Nature easily asserted her own power, inasmuch as men approved in another as well done that which they could not do themselves (Cic. Amic. VII.24)[23].

[21] Cicero, *De Finibus bonorum et malorum*, with an English translation by H. Rackham, London, William Heinemann, 1930, p. 53.

[22] In this context, we should pay attention to the extraordinary speech *For Marcus Caelius*, where Cicero moralizes, quoting not only Ennius' and Homer's poems, but also comedies by Plautus, Terentius, Caecilius Statius. This speech is very unusual in style – it contains humorous plays on words and subtle hints by which Cicero tries to identify with great comedy dramatists and ask the reader really important and serious questions.

[23] Cicero, *De Senectute. De Amicitia. De Divinatione*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi052.perseus-eng1:24> (last access: 10.12.2018).

Cicero denies the very basis of the Greek theatre – poetic mythology. Cicero believes that poets operating with a word-fiction are useful only for educated people who understand that they are presented with harmless delusions. For all the rest, poetry is a significant danger, «…ordinary people enjoy and praise things that do not deserve praise» (Cic. Off. III.III.15)[24]. At first glance, it seems that, in the theatre, Cicero feels indignant about the inveracity of the spoken word devoured by the audience.

For Cicero, the theatre was an indicator of public opinion and sentiment, which originally relied on the word spoken in Old Greek and only then – in Latin. Public rehabilitation or censure in the theatre was a powerful educational force, the effect of which was experienced by both Greeks and Romans. Cicero reports on the difference in the education of Athenian spectators and spectators-Spartans:

> There is a story that when an old man entered the theatre at Athens during the dramatic performances, not one of his countrymen in that vast crowd offered him a place; but when he came to the special seats occupied by the Lacedaemonians and assigned to them because they were ambassadors, all of them arose, it is said, and invited him to sit down. After this action had been greeted by the whole audience with repeated applause, one of the Spartans remarked, 'These Athenians know what politeness is, but they won't practise it' (Cic. Sen. XVIII.63-64)[25].

It is impossible to say which chronological segment is involved in the fable, and how widely such attitude towards elders was spread among the Athenians. Perhaps, Cicero, who had no special liking for the Greeks, exaggerates a little, intentionally introducing the episode in which the Athenians, known for their good manners, are inferior to the Spartans who received soldierly education.

Cicero is silent about his compatriots' behavior in the theatre. However, Plutarch speaks about their manners and understanding of the acceptable and unacceptable in the theatre. He narrates about the incident that occurred with some spectators-equites in the Roman theatre during Cicero's consulate, who also came from the equites. In token of respect to the equites, praetor Marcus Otho granted special seats in the theatre to the equites, which all other orders didn't like,

> The people took this as a mark of dishonour to themselves, and when Otho appeared in the theatre they hissed him insultingly, while the knights received him with loud applause (Plut. Cic. 13)[26].

[24] M. Tullius Cicero, *De Officiis*, with an English translation, Cambridge, Harvard University Press, 1913, <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:pos=3.15> (last access: 15.12.2018).

[25] Cicero, *De Senectute. De Amicitia. De Divinatione*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi051.perseus-eng1:63-64> (last access: 10.12.2018).

[26] Plutarch, *Plutarch's Lives*, with an English Translation by. B. Perrin, Cambridge, Harvard University Press, 1919 <http://data.perseus.org/citations/urn:cts:greekLit:tlg0007.tlg055.perseus-

Whistling and applause quickly turned into mutual insults and confrontations. Plutarch claims that Cicero had to shepherd the people out of the theatre, collect them by the temple and pronounce a moralizing speech. After that, the audience again returned to the theatre and applauded Otho together with the equites. The event illustrates the fact that the Roman theatre, located in the heart of the city, guaranteed political consensus. It is no coincidence that when talking about the state structure and the fact that justice means the observance of civil rights, Cicero turned to the metaphor of the theatre:

> But just as, though the theatre is a public place, yet it is correct to say that the particular seat a man has taken belongs to him, so in the state or in the universe, though these are common to all, no principle of justice militates against the possession of private property (Cic. De F. 3.XX.67)[27].

This conclusion is preceded by the thesis about the nature of man and his connection with the whole human race through the civil law. Following the logic of ancient Greek thinkers, Cicero compares the global and the local: the theatre acts as a small copy of the city, where the correct organization and order reign among the spectators-townspeople.

In Cicero's writings, the author's text on the subjects topical for the Roman citizen is combined with numerous quotes from the «great and glorious» Greek poets. Through citing them, Cicero acts at the same time as an interpreter, popularizer and educator for his compatriots. Cicero had been obsessed with the desire to take on this role since his youth when he translated the poem «Phenomena» of the Greek poet Aratus Solensis (ca. 315-240), as he indicated in his treatise «On the Nature of the Gods»[28]. Cicero's translation exceeded the requirements of his teachers, which indicates Cicero's deep interest in serious Greek poetry. Cicero's bother, Quintus, obviously had the same interest. In Cicero's writing «On the Laws», the main characters are Cicero and Quintus, the latter depicted as a specialist in poetry.

Despite the fact that here Cicero defines poetry as entertainment, in other works, he repeatedly extends its functions in human life and emphasizes its educational significance. In «De finibus bonorum et malorum», he addresses his compatriots with the question of why they are they are fond enough of reading fables in Latin, translated word for word from the Greek (Cic. De F.I.II.4)[29]. Cicero solves all questions of taste preferences appealing to the unconditional value of the Latin language: Ennius' «Medea» cannot and should not be spurned if the reader likes Euripides's Medea (Cic. De F. I.II.5)[30]. A little

eng1:13.3> (last access: 10.12.2018).

[27] Cicero, *De Finibus bonorum et malorum*, cit., p. 289.

[28] M. Tullius Cicero, *De Natura Deorum*, O. Plasberg, Leipzig, Teubner, 1917, <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi050.perseus-lat1:1.1> (last access: 07.12.2018).

[29] Cicero, *De Finibus bonorum et malorum*, cit., p. 5.

[30] *Ibid*., p. 7.

further he begins to talk about the translation of Greek poets into Latin, that is, about the activity that has attracted him since his youth (Cic. De F. I.II.6)[31]. It seems insufficient to Cicero to carefully convey the words spoken by the Greeks, he wants to supplement it with Roman words, even though the logic of the narration will be different. Having paid tribute to translating, Cicero makes an interesting conclusion, which, in simpler terms, can be expressed in the following way, «Let the Greeks read the Greeks, and the Romans need to read the Romans». It is noteworthy that Cicero derived this instruction to compatriots from his reasoning about poetry.

Being a disciple of the Greek mentors, Cicero, like Horace, tries to establish the Roman through the Greek, not losing sight of the poetic sphere. One of Cicero's favorite poets was Quintus Ennius, the author of the Roman Chronicle in verse. The pathos of Ennius' poetry is partly expressed in Cicero's writings, in which he tries to find his own way of translating the Greek «in the Latin manner». In one of his letters of 54 BC., Cicero convinces the addressee that he has to give up his longing for Rome for the sake of more important matters and quotes from Ennius' Medea, «Many a man himself and country well hath served neath alien skies; Many a man, at home abiding, from his rut hath failed to rise» (Cic. Fam. VII.6)[32]. Cicero explains that at her time, the Corinthian women forgave Medea her longing for the homeland, because she managed to convince them that she was one of the first, not the last. Cicero completes the letter saying that since he mentioned Medea, his addressee should remember the following, «Vainly wise, the fruits of wisdom for himself who cannot pluck» (Cic. Fam. VII.6)[33]. Here Cicero plays with words, so that his moralizing manner should not sound so assertive. When he first mentions Medea, he does not indicate that he takes the lines from Ennius' «Medea», meaning that any educated person is familiar with this poetic version of the Greek myth. Anyway, he does not explain whether his words are a quote from some other version (Greek or Roman) of the myth or his own words.

The reference to «Medea» in a letter in which Cicero instructs his friend in the correct understanding of career growth, suggests that Ennius gave her the features that enabled the Romans to identify with her[34]. Despite Cicero's active reference to the Old Greek authors, in this letter, he intentionally does not quote Euripides' Medea, in which one can find many fragments to confirm one's thoughts. The reference to Ennius' «Medea» allows Cicero to not only instate the Roman poetry in its rights but to instate its right to educate the Romans. This right seems so natural to Cicero that he does not challenge the

31 *Ibid*., pp. 7-9.

32 Cicero, *The Letters to his Friends*, with an English Translation by W. Glynn Williams, M.A., vol. II, London, William Heinemann Ltd., Harvard University Press, 1952, p. 27.

33 *Ibid*., p. 29.

34 G. Manuwald, *Medea: transformations of a Greek figure in Latin literature*, «Greece & Rome», vol. 60, n.1, 2013, p. 125.

appropriateness of educating his target audience (a male politician) through the character of a woman whose behavior was not distinguished by fidelity and righteousness.

Paying tribute to Plato and admiring him for the brilliant expression of his key ideas (including the pedagogical ones), Cicero addresses one of Plato's favorite topics – the educational influence of poetry on his fellow citizens. Even Cicero's interpretation of the foundation of Rome is based on the evaluation of Greek poetry and its mission in the lives of citizens, «the lifetime of Romulus fell in a time when Greece was already full of poets and musicians» (Cic. Rep. II.X.18)[35].

Despite the fact that Cicero's argument often falls into the trap of Roman patriotism, Cicero manages to clearly identify his idea: his contemporaries, like himself, are not just translators who need to convey to the reader the essence of what the author said, but they also strive to express their own opinion. In «The Speech for Aulus Licinius Archias, the Poet», Cicero pretends to forget about the «poetic competition» between Greece and Rome and tries to reconcile both sides. The defendant is a reputable Greek poet recognized in Rome and a friend of Cicero. With the support of one of his admirers, he acquired the rights of Roman citizenship. In 61 BC, a certain person named Gratius opposed him in court, challenging these rights. Cicero defended the poet with a speech and, probably, won the case. This speech is one of Cicero's most striking and unusual speeches, in which he puts forward the idea that Roman citizenship should be given to foreigners, and especially to the Greeks, who have not only called Rome their new homeland, but enriched it with their culture and oratorical skill. Having decided to defend the poet, Cicero not only proved the inconsistency of the accusations and demands for the exile of Archias from Rome, but he managed to convince the Romans that to be a poet is as honourable as to be a political or military leader. In fact, Cicero's speech was focused on the fact that one can educate worthy citizens and bring fame to the state in different ways, through arts, in particular, whose importance for the formation and development of man cannot be underestimated. Be that as it may, but «Cicero's speech on behalf of Archias posed a tricky problem: how may one justify giving Roman citizenship to a Greek intellectual and poet?»[36].

In «Divination», Cicero appeals to the authority of Greek philosophers and scientists and mentions the playwright Sophocles in a rather peculiar context. Cicero writes that after a gold cup had been stolen from the temple of Hercules, Sophocles saw in a dream who had done it. Sophocles told about that in the Areopagus, and the culprit was detained[37]. Cicero considers this non-standard

[35] Cicero, *On the Commonwealth and On the Laws*, in James E.G. Zetzel (ed.), Cambridge University Press, 1999, p. 38.

[36] Corbeill, *Education in the Roman Republic: creating traditions*, cit., p. 274.

[37] Cicero, *De Senectute. De Amicitia. De Divinatione*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi053.perseus-eng1:1.54> (last access: 10.12.2018).

role of the poet in the city life worthy of description; however, he finishes it with the following phrase, «But why am I dwelling on illustrations from Greek sources when – though I can't explain it – those from our own history please me more?» (Cic. Div. I.XXV.55)[38] In «On the Laws», written between 54 and 51BC, Cicero calls Aristophanes «the cleverest poet of the old comedy» (Cic. Leg. II.XV.37)[39]. In the speech for Gaius Rabirius 54 BC, Cicero tries to bring into discredit the prosecution witnesses from Alexandria through the fact that they come from a city whose inhabitants were often the characters of the «new comedy» (or «comedy of humours») (Cic. Rab. Post. 35-36)[40]. Cicero regards the word as a weapon which allows the city to live by the rules and by the law. By trying to convince his compatriots of that, Cicero gently apologizes for quoting Greek but not Roman examples. The general tendency in his writings is the following: Cicero quotes from Greek poets only to support his Roman argument or to emphasize the artistic merits of the writing (Cic. Leg. II.XV.37; Cic. De F. XXXII.105; Cic. Off. III.XXI; Cic. Off. III.XXIX.108, etc.)[41]. Cicero turns the «Tusculan Disputations» into a speculation about the correctness or incorrectness of the word, which was once expressed by the triad of the greatest Greek playwrights Aeschylus, Euripides and Sophocles. When quoting fragments from different tragedies, Cicero acts as an interpreter who often intentionally enhances the emotionality of the Greek word in Latin: he describes physical and moral sufferings of wounded Hercules, executed Prometheus, perishing Odysseus and irrational Theseus (Cic. Tusc. II.VIII. 20; II.X. 23; III.XXXI.76; II.XIX.49; III.XIV.29)[42]. The educational potential of these fragments looks obvious to him: poets like no one else can understand and convey to the audience that «habit is not to be despised as a master in the art of bearing pain» (Cic. Tusc. II.XXI.49)[43].

Criticizing the content of the Greek theatre productions, he, however, has nothing against the form and admires the scale. According to Seneca, Cicero claimed, even if he had lived two lives, he would not have been able to read all

[38] *Ibid*., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi053.perseus-eng1:1.55> (last access: 10.12.2018).

[39] Cicero, *On the Commonwealth and On the Laws*, cit., p. 144.

[40] M. Tullius Cicero, *M. Tulli Ciceronis Orationes: Recognovit brevique adnotatione critica instruxit Albertus Curtis Clark*, Albert Clark, Oxonii, e Typographeo Clarendoniano, 1909, Scriptorum Classicorum Bibliotheca Oxoniensis, <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi030.perseus-lat1:13> (last access: 07.12.2018).

[41] See: Tullius Cicero. *De Officiis*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:pos=3.21> (last access: 10.12.2018); <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:pos=3.19> (last access: 10.12.2018); Cicero, *De Finibus bonorum et malorum*, cit., p. 197; Cicero, *On the Commonwealth and On the Laws*, cit., p. 144.

[42] See: *Cicero's Tusculan Disputations*, transl. with an introduction and notes by Andrew P. Peabody, Boston, Little, Brown, and Company, 1886, pp. 100-101, 102-104, 109-110, 118-120, 187-189.

[43] *Cicero's Tusculan Disputations*, cit., p. 123.

the lyric poets (Sen. Ep. XLIX.5)[44]. But his desire to unite Greek poetry and the Roman eloquent word gave a new life to the theory and practice of educating the orator. In Cicero times, treatises on educating orators recommended carefully studying the acting technique, and Cicero complied with the rules. Largely owing to Cicero's accounts of attending the theatre:

> We learn how the words of actors were transformed into political statements by the response of the spectators, and sitting in a prominent seat Cicero was never the disinterested spectator he hoped to be[45].

In the Roman Empire, the line separating the orator from the actor was rather fine, since it was important for either of them to take on someone's role. Cicero was on friendly terms with many Roman playwrights and actors, adopting from them the technique of scenic (self) presentation and appropriate moralizing:

> These emotions are acted well, and indeed better by an orator, if he be indeed an orator, than by any stage-player; but they are acted deliberately and with a quiet mind (Cic. Tusc. IV.XXV.55)[46].

Cicero had to defend Quintus Roscius the Actor by some quirk of fate, and he used his defense speech to develop this idea.

«The Speech for Quintus Roscius the Actor» was written for a trial that resulted from the fact that a man named Gaius Fannius Chaerea had articled his slave Panurgus to Quintus Roscius, a famous actor, on condition that Roscius was to teach him the art of acting. Teaching talented slaves for profit was a popular practice in those years. The pedagogical deal promised to bring profit to both the master and the teacher, but at the beginning of his career, Panurgus was killed. That initiated a series of trials where the slave's master and the slave's teacher got entangled in who owed what to whom. The beginning and the end of speech are lost, but in general, Cicero composes it in the following way: he tries to protect the good name of the actor Roscius, who is a worthy representative of the Roman intellectual elite. In this speech, Cicero does not mention his doubts about the possibility of education by the theatre and in the theatre, which he generously shares in many of his works, but focuses on proving the innocence of Roscius as a good teacher of the actor's profession.

In the time of Cicero, both orators and actors carried the spoken word into masses, but their financial position was far from identical. Cicero quotes the

[44] Seneca, *Ad Lucilium Epistulae Morales*, 3 vols., Cambridge, Harvard University Press, 1917-1925, <http://data.perseus.org/citations/urn:cts:latinLit:phi1017.phi015.perseus-lat1:49.5> (last access: 07.12.2018).

[45] D. Wiles, *Theatre and citizenship: the History of a Practice*, Cambridge University Press, 2011, p. 12.

[46] *Cicero's Tusculan Disputations*, cit., p. 231.

fees of the most famous Roman actor Roscius, and the law which allowed beating actors with sticks for their errors fades when compared with them. The Roman approach to the organization of theatrical performances could not stand economizing; however, millions of sesterces spent on their organization seemed to Cicero a waste of money. He was interested in the price of the word spoken from the stage (both literally and figuratively).

Cicero's reasoning about this should be considered with allowance for the fact that the theatre, in the sense in which it was admired by the citizens of Greek poleis, occupied a rather modest place among other Roman spectacles[47]. But taking into account that Rome in Cicero time was a city with a million population, the audience, who preferred the traditional theatre to gambling and cruel spectacles, was still quite large. Paying tribute to Pompey, who built a magnificent stone theatre in Rome, Cicero criticizes Pericles, who spent money on the construction of the propylaea of the Athenian Acropolis[48]. Cicero considers expenditures for the construction of city walls, shipyards, ports and water pipes more preferable than "vicious", but sometimes necessary, expenses for the culture:

> Out of respect for Pompey's memory I am rather diffident about expressing any criticism of theatres, colonnades, and new temples; and yet the greatest philosophers do not approve of them… (Cic. Off. II.XVIII.60)[49].

Cicero uses the famous Greek statement that one should observe measure in everything, including in what is going on the stage, against the theatre. His «reasonable measure» is to minimize entertainment for citizens, as they do not do the state and the city any good. When speaking of the money spent by the rich on the entertainment for the poor, Cicero demonstrates a pragmatic Roman approach. He calls the organizers of theatrical and other shows «shallow flatterers, if I may call them so, who tickle with idle pleasure, so to speak, the fickle fancy of the rabble» (Cic.Off. II.XVIII.63)[50].

The Roman poet Horace expands this idea emphasizing that entertainment often are not always beneficial to the citizens. He writes ironically about the taste preferences of his contemporary theatre-goers, who find pleasure in «trivial games» and rustle in the theatre like a sea, «[…] in the midst of the play, call for either a bear or boxers; for in these the mob delight» (Hor. Ep. 185-

[47] C. Campbell, *The Uncompleted Theatres of Rome*, «Theatre Journal», vol. 55, n. 1, 2003, pp. 67-79.

[48] The famous marble portico which included a gate, a central corridor, a colonnade, pinakotheke pavilions and a library. The construction of this architectural and partly educational center was started by Pericles, but then suspended.

[49] Tullius Cicero, *De Officiis*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:2.60> (last access: 10.12.2018).

[50] *Ibid*.

186)[51]. In the Roman theatre, there were no longer so many well-off spectators as there were in ancient Greece, because Romans preferred to organize theatre performances in their homes. In general, the audience consisted of equites and proletarians, and therefore Horace calls the theatre-goers a derogatory word «the mob». Those whom Cicero called «the educated people» did not fancy spending time with «the mob» watching mass theatre performances. «It is profitable for you, O Caesar, that the people should be engaged in us», the famous dancer Pilad allegedly said to Emperor Augustus. «Bread and circuses», that's how poet Juvenal formulated the same idea. That's why the spectacles in the empire were a vivid entertainment, not a political satire.

In «On the Laws», Cicero classifies «public games» and argues that competitions «to the full victory» (running, fisticuffs, wrestling, chariot competitions) must be arranged in a circus, and not in a theatre. Turning to Plato, he defines the theatre as a space of agonism, which is rather internal than external. In the theatre, music influences «gentle and unstable minds», changing the audience sometimes for the better and sometimes for the worse: the passive audience awakens for activity, and the active one, on the contrary, calms down. Since in «On the Laws» this characteristic of the theatre and its pedagogical influence is revealed in the dialogue between Mark and Atticus, who loved everything Greek, Cicero concludes by giving a rather mild definition of theatrical agons, «The theater should resound with singing to the lyre and flute, so long as it be moderate in accordance with the law» (Cic. De leg. II.XV.38)[52].

However, Cicero himself favoured not the theatre in the classical meaning of the word, but gladiator games. In a letter to Atticus, Cicero congratulates him on the purchase of a gladiator troop (Att. IV, 4a)[53].

Despite the popularity of gladiatorial games, the profession of the owner of the gladiator school (the lanist) was not popular among the Romans and regarded something similar to brothel holders. Pliny the Younger, Roman politician, writer and orator, managed to justify Cicero's addiction to such spectacles (Plin. Ep. V.III.2)[54]. Anyway, such a subtle observer as Cicero could not help seeing some weaknesses of the theatre as the backbone of civil society:

> The stoic coldness of the intelligent republican politician forbade any sentimental objection to the blood sports. […] But sentiment aside, the republican could not find an effective rebuttal to the violent pleasures of patrimonial society, and each small acquiescence to theatrical bloodiness was a nail in the coffin of the Republic[55].

[51] Horace, literally translated by W. Smart, M.A., London, Printed for Whittaker, Treacher & Co., 1830, p. 251.

[52] Cicero, *On the Commonwealth and On the Laws*, cit., p. 144.

[53] M. Tullius Cicero, *Letters to Atticus*, L.C. Purser, (ed.), <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi057.perseus-lat1:4.4a.2> (last access: 10.12.2018).

[54] Pliny the Younger, *Letters*, <http://data.perseus.org/citations/urn:cts:latinLit:phi1318.phi001.perseus-lat1:5.3.2> (last access: 07.12.2018).

[55] P. Murphy, *The Birth of Humanism*, «Thesis Eleven», vol. 40, n. 1, 1995, p. 59.

The issue of the price of the word spoken from the stage in the figurative meaning was often discussed by Cicero in the context of the idea of a person's opportunity and ability to live honestly and morally beautifully.

Cicero compared his compatriots not with the Roman gladiators, but with the actors of the classical Greek productions, who had to «play» well in their life drama and deserve approval in the end (Cic. Sen. XIX.70)[56]. Wiles notes that Cicero repeatedly turns to the theatre to find analogues for citizen behaviour, «since citizens are performers in the public sphere of the forum»[57]. In «On Duties», Cicero says that a person who claims to be called a wise man should learn a lot from actors who only deal with what they are able to and do not undertake to solve impossible tasks (Cic.Off. I.XXXI.114)[58]. The life role of a man, for Cicero, consists of actualizing his natural qualities, avoiding vices, maneuvering between incidents, and following his own decisions (Cic. Off. I.XXXI.115)[59]. He regards the devaluation of one's own word or its inappropriateness as two greatest dangers for an educated person. Cicero gives an example of Sophocles who inappropriately praised a passing boy when speaking to Pericles. Pericles strictly pointed out to the poet that he is a praetor and not at an athletic contest to allow himself such value judgments (Cic. Off, I.XL.144)[60]. Cicero emphasizes that the meaning of the place and time for the word is so great that anyone, and the poet, in particular, must understand it. In «On Old Age», Cicero exposes Sophocles in a completely different way and, on the contrary, demonstrates his rare ability to influence others through the spoken word. Cicero says that the poet's memory did not fail him till the very old age and he was writing so many tragedies that he forced his sons to sue him for the negligent attitude to property (Cic. Sen. VI.21-22)[61]. Thereupon, it is said, the old man read to the jury his play, «Oedipus at Colonus», which he had just written and was revising, and inquired, «Does that poem seem to you to be the work of an imbecile? When he had finished he was acquitted by the verdict of the jury» (Cic. Sen. VI.22-23)[62].

Without making a direct conclusion, Cicero hints that Sophocles still managed to live honest and morally beautiful life, albeit with some reservations.

[56] Cicero, *De Senectute. De Amicitia. De Divinatione*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi051.perseus-eng1:70> (last access: 10.12.2018).

[57] D. Wiles, *Theatre and citizenship: the History of a Practice*, cit., p. 53.

[58] Tullius Cicero, *De Officiis*, cit., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:1.114> (last access: 10.12.2018).

[59] *Ibid*., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:1.115> (last access: 10.12.2018).

[60] *Ibid*., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi055.perseus-eng1:1.144> (last access: 10.12.2018).

[61] *Ibid*., <http://data.perseus.org/citations/urn:cts:latinLit:phi0474.phi051.perseus-eng1:22> (last access: 10.12.2018).

[62] *Ibid*.

Conclusion

Cicero saw the meaning of education in developing a «decent man» – an active and conscious citizen craving for not only «bread and circuses», but able, without hesitation, to sacrifice his well-being, property and even life for the sake of the state. Cicero, in fact, equated the culturally appropriate education with the political stability of the state, since both required conscious involvement of a citizen in public life. For Cicero, the educational ideal of education through culture was not a dream, but a goal that should and must be achieved for the benefit of the state.

Some details of Cicero's life and career suggest that Cicero had enough reasons not to speak directly about everything in his texts. When evaluating a word spoken by a poet or an actor, Cicero is not always consistent. However, the fact that the theatre and poetry are able to exert a strong influence on human minds (albeit not always positive) was never questioned by him. The Roman theatre of Cicero times was the place of «ancestral generosity» (the term of P. Murphy) in the broadest sense of this generosity. Money generosity of the organizers of theatrical performances was combined with the generosity of the word coming from the stage. Cicero's argument demonstrates the need for a clear understanding of the educational power of poetry and theatre. According to Cicero, a list of people who have lived dignified lives should include those «who have put these distinctions to noble use are, it seems to me, like skilful actors who have played well their parts in the drama of life to the end, and not like untrained players who have broken down in the last act» (Cic. Sen. XVII.64)[63]. The issues of educating and self-educating such people were vital for Cicero, though the simplicity and unambiguity of their presentation leave much to be desired. In many of his writings, Cicero emphasizes one and the same idea: an educated person is the one who is able to build himself in the space of culture by inquiring, acquiring and profiting.

63 *Ibid.*

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Female bildungsroman in Czech conduct periodicals: the inception of the genre

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ABSTRACT: The paper discusses the beginning of female bildungsroman in the Czech culture between the 1860s and 1870s and recognises the process of establishing its main hermeneutic codes concerning gender, nation, and class. Firstly, I investigate the historical substantiation of conduct fiction for the women as embedded into the literary culture of Czech nationalism and the early stages of establishing systematic education for the girls. Then I explore the continuum of conduct fiction published in the journal for girls «Zlaté klásy» between 1867 and 1875 as a moral campaign aimed at recruiting the girls into new practices such as educating at the Czech schools, practising Czech identity including speaking Czech language, and marrying the Czech men exceptionally.

EET/TEE KEYWORDS: Bildungsroman; Conduct Periodicals; Women's Education; Czech Republic; XIXth Century.

Introduction

The opportunity to be noble means to be Czech. If the Czech girl wants to be young lady (*slečna*) she has to reject accepting placeless things (*cizot*). Speak Czech, dress like Czechs, read Czech books! The Czech men will not want other wives than authentic Czech women, and those girls who refute their Czechness would fade[1]. Czech men have definitely disappointed my mom. Also she hates Czech itself - to her, it is an old fashioned abused language in which the majority of words have lost their primary meaning. She has a cautious attitude toward Czech history and accepts the Czech national Revival as the biggest mistake – to her, by approaching national independence, Masaryk sacrificed Czech women

[1] *Z denníku devatenáctileté dívky* [From the diary of nineteen-year girl], «Zlate Klasy», 1869, pp. 91-105, in particular p. 103.

to the Kondeliks[2], Jakešs[3], Svejks, Milošs Zemans and Pažouts[4] or in the best case, to neurotic impotent such as Kafka or Karel Čapek[5].

These mutually reverberating quotations stem from the texts published first in 1869 and 2001 respectively. Both are narrations on behalf of young Czech girls who are looking for their female happiness and finally approach it – in the marriage with the Czech man. Even more, in the novel by Viewegh the male character re-educates his wife and her mother, who finally accepts the long-term love of her neighbour, the ordinary Czech man, while her pregnant daughter is sitting on the husband's lap, who tellingly was the first lover of her mother. Started in the nineteenth century, the battle for the souls, minds and bodies of the Czech women directly shaped the *longue durée* of the Czech female Bildungsroman aimed at conducting the Czech women becoming and remaining the Czechs. This text discusses the beginning of female bildungsroman in Czech culture between the 1860s and 1870s and recognises the process of establishing its canonical genre, comedy, heavily relied upon disciplining humour.

The article is made up of two parts. Firstly, I discuss the historical substantiation of conduct fiction for the women as embedded into the literary culture of Czech nationalism and the early stages of establishing systematic education for the girls in the Southern Bohemia, the heart of the late Czech Revival. I bring into analytical focus the composition of driving forces that mediated adapting the genre of Bildungsroman and its specific pathway in the Czech mainstream culture. Then I explore the continuum of conduct fiction published in the journal for girls «Zlate Klasy» between 1867 and 1875 as a kind of moral campaign aimed at recruiting the girls into new practices such as educating at the Czech schools, practising Czech identity including speaking Czech language, and marrying the Czech men exceptionally. Mapping the diversity of the texts published in «Zlate Klasy» aims to recognize the traces of adapting Bildungsroman and the main units of cultural information employed by the Czech writers, Sofie Podlipksá and Venceslva Lužická, who were recruited by the Czech men for educating young female audience. Exploring the plots of four texts recognises the main hermeneutic codes for producing the canon of the Czech female Bildungsroman. The main sources for this analysis are the periodicals, the materials from the State archive and the Library of Prácheň muzeum in Písek, and the Museum of Czech Literature, Literary Archive (MCL LA).

[2] Václav Kondelík a character in the famous female coming-of-age comedy *Otec Kondelík a ženich Vejvara* (The father Kondelik and the groom Vejvara, 1937). Kondelik is a traditionalist who does not understand the intention of his daughter Peppa, and who represents the cliché of a tyrannical father.

[3] Miloš Jakeš, the leader of the Czechoslovak Communist Party, known for his unattractiveness.

[4] The naive poor-learning student of high school from *Mach a Šebestová*, a popular Czech cartoon TV series in the 1970s.

[5] M. Viewegh, *Román pro ženy* [Novel for women], Prague, Petrov, 2013, pp. 34-35.

1. *Female education. The arm of Czech nationalism*

1.1 *Education for the czech girls: struggling for the souls and bodies of the nation*

The general pathway of compulsory education in Austro-Hungarian Empire directly affected the formation of ideological grounds and very first attempts to institutionalise the Czech education for the girls. Introduced in 1774, the General School Order framed the compulsory education as a vehicle for disseminating and fixing Germanness. Among other requirements, local authorities had to train girls in housekeeping, sewing and knitting along with German language, religion and shorted course of sciences. Bohemia was one of the most educationally minded areas overloading of the schools of this mode by the end of the 1810s[6].

The intention to enlighten the empire's subjects faced long-term lack of institutional and human resources. Despite the consistent efforts towards secularising compulsory education, until the 1860s the clergy were key actors especially in smaller cities and towns which were obliged to provide the access to elementary education too. Also between 1848 and 1867 in different parts of the empire the tensions between nationalistically oriented priests and the imperial authorities increased including the issue of education as an object of the contest between core and periphery. After establishing Austro-Hungarian Compromise in 1867, the call for secularizing compulsory education started to be a part of the mission to protect the interests of empire. This turn orchestrated the significant changes in the curriculum including the curriculum for the girls which became more focused on vocational training than preparing for family life[7]. The Compromise sharpened the issue of the language of education that increased with the rise of nationalism after 1848[8]. Inapproachable for Czechs and Slovaks, education in the vernacular was a kind of demand that recruited the entire complex of requests concerning historical rights, laws and identities[9].

The nationalistic movements reflected the imperial agenda of educational reform in the cascade of dichotomies such as religious vs. secular, nationalist identity vs. cosmopolitism, emancipation vs. domestication. The approaches to solve these dichotomies recomposed the nationalistic elites and brought forward

[6] G. O'Brien, *Maria Theresa's attempt to educate an empire*, «Peadegogica Historica», vol. 10, n. 3 1970, pp. 542-656, in particular p. 560.

[7] S. Moore, *The professionalization of teaching: teacher training and education reform in Austria 1867-1914*, «History of Education», vol. 1, 2018.

[8] B. Manz, *Multi-ethnic Empires and the formulation of identity*, «Ethnic and Racial Studies», vol. 3 n. 1, 2003, pp. 70-101, in particular p. 75.

[9] A. Kičková, M. Kiššová, *Nineteenth century female education in the Slovak Region of the Austro-Hungarian Empire*, «History of education Children's Literature», vol. VIII, n. 1, 2013, pp. 503-522.

the issue of female education as a core of nationalistic agenda. The obvious conservative backlash of educational agenda of nationalistic movements across Austro-Hungarian Empire can be seen as the very first response to these changes in the imperial agenda of compulsory education[10]. Emancipation of the women started to be seen as a product of imperial pernicious influence. The call for proper education as the bridge to proper marriage and performing the role of Czech housewife and mother was especially hearable in periphery where the access to vocational training of the girls was in contest with the men's interest to very limited labour market.

All faithful friends of Czech people call for applied training for girls today when many young females either seem to be unable to housewife or in worse cases are animus towards the activities indispensable for proper house holding. Only the schools for girls could provide such training, which do not impose to young women useless new-fashioned cognisance but bring forward competencies and skills irreplaceable in ordinary life of married women, in their future employment of wife and mother[11].

Preparing girls to become good housewives dovetailed with the mission to preserve them for reproducing the Czech nation – being married with the Czech men exceptionally, giving birth to Czech babies and educating them in line with Czech ideals. Local newspapers published on the front pages the article with alarmist title like *Martial exercise is close!* The main issue of such texts was the pernicious effect of arrival of imperial regiment on local young women. While the officers usually were accommodated by local families, the balls and other entertainment put the Czech girls under the risk to be seduced by Germans:

> A legal adviser who lived not far from our town, well-known compatriot and wealthy man settled two his daughters to German officers. Two daughters of the Czech nation together with their potential offspring have been lost… German officer is the ideal of our modest fragile girls, exactly the daughters of craftsmen and merchants overtly refute their fathers and their profession what would ensure their expectations from the future. For such acknowledgement [intercourse with German officer] many of our girls are prepared to trade in their national origin and mentality[12].

Soon, the battle for the female bodies started to be embedded to more general contest with German entertainment whose harmful influence especially on women was seen as one of the great enemies of cultivating Czechness:

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

[11] *Ženský obzor* [Women's Review], «Stráž Ve Vodňanech» [Guardian in Vodňany], 30 august 1899, p. 3.

[12] *Vojenské cvičení bliže* [Martial exercise is close], «Jiihočeské rozhledy», 6 september1904, p. 1.

They [Czech middle class] speak German, they read German, they attend German theatres, and mainly all these German things are the result of female family members' devotion who manage entertainment the fathers try to be patriots though in public life because they want to be elected to Assembly [Czech Provincial…], local representatives and who knows where, but the wives and daughters do not make even minimal efforts to be the Czech, they equalise themselves with their German neighbours, they submit German reviews and spend the rest of their time by reading fashion magazines[13].

Seen as demandable for the revival of the Czech nation, the task «to emancipate the Czech girls from wealthy families from the very plausible threat of germanisation»[14] seemed to be hardly achieved mission. Along with limited options to educate the girls, the obvious lack of the interest to education among the girls and especially their parents thwarted uniting the Czech elites and masses, one of the desirable outputs of the education for the Czech nationalistic movement[15]. The first Czech high school for the girls (*vyšší dívčí škola*) established in Písek in 1861 aimed to struggle against «superficial *bildunk* alienated our girls from the Czech mode of life or even more denationalised them»[16]. The first cohort of students was made up of 15 young women from local wealthy families. The school operated until the end of the 1910s. Which composition of driving forces made it possible?

1.2 *Fathers and husbands forward! Male leading of female education in Czech periphery*

According to the local educational chronicles, the history of the school for the girls in Písek started from the consistent rejection of German education as an irrelevant option for the Czech girls. The very first initiators who promoted the establishment of school were the fathers – those who were seen by the local society as the owners of household and the co-owners of the female offspring. The Deputy Matěj Havelka had two daughters and was interested in the options to continue their education in regular basis, being a Czech patriot he rejected the idea to send his daughters to Austrian or German private school and organised systematic meetings of his daughters with the most educated men

13 F. Schulz, *Literární obecenstvo české* [Czech literary society], «Osvěta», vol. 8. n. 1, 1878, pp. 75-80, 149-159, in particular p. 157.

14 J. Malý, *Paměti profesora K.Ningra* [In tribute to Professor K.Ningr], Písek, Podhajský, 1922. p. 96.

15 M. Banenská, *Počátky emancipace žen v Čechách. Dívčí vzdělávací a ženské spolky v Praze v 19. století. Gender sondy* [The inception of women's emancipation in Bohemia. Female education in Prague in the XIX century. Gender studies], Prague, Libri, 2005.

16 J. Malý, *Písek Kolébkou českého vyššího dívčího školství* [Písek: The cradle of Czech high educations for the girls], *Písek* Nakladaelství a knihtiskárna Fr. Podhajský a spol., 1935, p. 2.

in Písek: «The entertainment slightly transformed into teaching. Havelka taught his daughters the essentials of astronomy, Professor Karl Ninger – about the Crusades and some chapters of the Czech past, Professor V. Zikmund about the Bolzano[17] theory»[18]. But not all fathers were able to organise such independent home education. The school teacher Soukup whose daughter Terezia ended compulsory education in 1857 initiated the public campaign in local newspaper and started to discuss with his colleagues the options for regular education for the Czech girls in Písek. Three years later under the protection of local priest Vojtěch Myška, «the best possible protector of such project»[19], the annual regular course for ten girls was organized. Each month girls learnt 20 hours: history, natural science, Czech language and Czech literature. Next year the school was established. The girls were educated by Czech pedagogues who experienced success in developing the education for the boys.

Písek was in the vanguard of developing national education. In the 1850 newly established school for the boys aimed to prepare them to develop small and middle size busyness as the grounds for welfare infrastructure and emancipation from align, mainly German and Jewish economic predominance in the region[20]. The teaching methods and curriculum deserved the attention of the experts in the country and abroad. The patriotic education which was seen indispensable for teaching the boys, and together with practicalities of agriculture and forestry, the boys learnt Czech history, language and literature. The boy's school in Písek employed the compatriots who presented the ideal pathway of their career being born in the local lower middle-class Czech families, achieve the highest possible level of education and returned to the periphery in favor of disseminating the knowledge to the next generations of the Czechs: Jan Krejčí[21], Adolf Heyduk[22], and Jan Suda[23]. Krejčí's mother was a washerwoman, Hejduk's father was a carpenter, and Suda's farther had his own manufacture for producing belts. Becoming teachers, one of the rare options to make public career for the Czechs made them those modern men «who succeeded them was an individual independent of divine power, who no

[17] Bernard Bolzano (1771-1848) was a Prague mathematician and a Christian humanist, who remained in consistent political opposition to Habsburg monarchy.

[18] Malý, *Písek Kolébkou*, cit., p. 19.

[19] Id., *Paměti professora*, cit., p. 91.

[20] In local mass-media the issue of proper education for the Czech boys and girls reverberated with antisemitic campaigns which attacked «the harm of Jews».

[21] Jan Krejčí (1825-1887) the first Czech writing geologist, a Deputy of the Czech Provincial Assembly who belonged tothe most nationalist wing of Czech politicians.

[22] Adolf Heyduk (1835-1923) was a poet, one of the prominent members of May School, who wrote fame *Songs My Mother Taught Me* set by Antonín Dvořák to song together with other poems by Heyduk.

[23] Jan Suda (1838-1910) was a teacher of languages, linguist and local politician who Being a deputy of of Reichsrat and the Czech Provincial Assembly between 1879 and 1885 successfully promoted including the vocational school for the boys into the list of the state-supported schools.

longer belonged to the community in which they originated and who enjoyed a high degree of political autonomy»[24].

Shielded by Church and led by male pedagogues, the Písek's education for the girls from the very beginning was sentenced to promote conservative pathway in line with the mission «to educate the girls in the spirit of Czechness»[25]. Religion, German and Slavic Mythology tellingly taught by Heyduk, cooking, physical activities as the main accompaniment to the course of natural sciences, fine art were the main subjects for teaching. Not academic achievement but proper marriage was seen as the best possible continuity of the education. In 1935 Jaromír Malý published a brochure which aimed to trace destiny of its graduates. Several photographs of graduates were accompanied by brief description of their family origin and their successful marriage: «The girl who is staying in white dress in the centre of the image is Josefina Mýšková, the wife of the influential Governing Council Jan Ríha»[26]. Describing the changes in social status of the graduates such as «she was a daughter of carpenter, and married a railway station officer» indirectly stress the role of the school as the social lift for the local girls whose success was directly determined by proper education. The author mentioned the proper position of the husbands as those who fixed the outputs of school education: «The daughters of Havelka, Zdeňka and Miloslava, married the influential art patron and famous lawyer respectively – undoubtedly, Czech patriots»[27]. Undoubtedly, performing this pattern achieves its triumph in the story of Emilie Reinorová who was only daughter of local restaurant-keeper, and who married Adolf Heyduk, her former teacher of fine arts.

In his own memories Heyduk particularized those students who were from other regions even more from Prague, their parental families and their husbands, all – prominent Czechs patriots:

> The school attracted the daughter of publisher Pospíšil, later she became the charming wife of Prague Counsil J. Otta, miss Kopfsteinová arrived from Votice and later married the physician Zeis in Tábor, from Nymburk the daughter of famous patriot Dlabaš who also married another Czech physician Joseph Emler[28].

Apart from personal charisma and consistent cultivation of Czechness, the educators heavily relied upon conduct periodicals – their own set of journals for the girls of different age aimed at supplying them by elevating reading[29].

[24] S. Vegetti Finzi, *Female identity between sexuality and maternity*, in G. Bock, S. James (edd.), *Beyond Equality and Difference: Citizenship, Feminist Politics and Female Subjectivity*, London, Routledge, 1992, pp. 117-137, in particular p. 129.

[25] Malý, *Paměti profesora*, p. 95.

[26] Id., *Písek Kolébkou*, p. 20.

[27] *Ibid*.

[28] A. Heyduk, *Vzpomínky literární* [Lireral memories], Prague, Otavan, 1911, p. 18.

[29] Malý, *Paměti profesora*, cit., p. 103.

1.3 *Submitting Czech souls. Indirect education in conduct periodicals*

In the 19th century formatting formal education for the girls orchestrated the intensive elaboration of indirect enlightened projects mainly in forms of conduct periodicals across Europe[30]. In Bohemia Písek was one of the pioneers in this trend. In 1860 the teacher of natural sciences at school for boys, Josef Pažout established and edited the first journal, «Dívčí škola» («The girls' school»), and the project named *Zlatá kniha dívek českých* (Golden Book) aimed to educate and amuse the girls simultaneously. Along with it, «Zlatá kniha» compensated the absence of textbooks for the girls – between 1861 and 1865 ten issues were disseminated among the students. The positive follow-up to this project inclined to establish «Zláté lístky» (Golden Leafs) for the girls up to ten years, and last but not least «Zláté Klasy» (Golden Ears) – for older girls.

The first originally Czech conduct fiction had been published in «Zláté Klasy» in 1867, the year of establishing Austro-Hungarian Compromise when the degree of intolerance to Germanness achieved its culmination among Czech patriots. Along with it, Jan Suda, a close friend of Heyduk, became the new chief editor of the journal. He brought forward the task to emancipate the girls from the influence of Romantism which was labelled as foreign or even more German. Undoubtedly, the male educators from Písek recognized that «telling effective, relevant stories became a vital quality for anyone who wanted power to determine and influence social practices» – but also they indicated the necessity to «make their stories mimetically and culturally relevant»[31]. Who could do it better than the most respected female writers who already gained their reputation as the successful authors of conduct fiction – Sofie Podlipská[32] and Anna Srbová alias Věnceslava Lužická?![33]

Despite the main difference, place of birth, Podlipská and Lužická had a lot of resemblance in their trajectories of life. They got the best possible education in private institutions even both stressed experiencing injustice during their school years. They marriage with the Czech patriots with particular affiliation with Slavdom movement. The pen name Lužická which she used due to the wish of her husband, an influential ministerial officer, sheds light on her performative identity. The writer admired her husband who had some relation to Lusatian Serbs – *Lužišti Srbovi*, and she took name *Venceslava* from the convent's history where her mother was educated.

[30] K. Moruzi, *Constructing Girlhood through the Periodical Press, 1850-1915*, London, Routledge, 2012.

[31] J. Zipes, *The irresistible fairy tale: The cultural and social history of a genre*, Princeton, Princeton University Press, 2013, p. 6.

[32] Sofie Podlipská (1833-1897), a sister of famous writer Karolina Svetlá, born in wealthy family in Prague.

[33] Anna Srbová (1832-1920) was born in wealthy family in Hořicí.

Podlipská and Lužická had the literal ambitions and were well embedded into the community of Czech writers. Podlipská started her career as a reviewer for the famous Czech review *Lumier* and a translator – she was one of the first adopters of George Sand[34]. The literal debut of Podlipská was necrology on Honoráta from Wiśniowskich-Zapová, a famous Polish author of female conduct fiction. According to archival studies of Luštincová[35], Gustav Pfleger-Moravský[36] supervised young Lužická, his niece, and commented her first literal attempts. Also, he directly encouraged the transfer of Lužická to Prague after the death of her husband. Podlipska and Luzicka, cooperated with «Zláté Klasy» during one of the most turbulent periods of their lives – both lost their husbands in 1867, and only started to experience writing as a source to nourish their families.

Along with the necessity to respond to the expectations of editors, Podlipská and Lužická had strong ambition to gain public acceptance as activists of nationalistic movement and were in closed relationship with Marie Riegrová-Palacká, the daughter of František Palacký, who among other activities participated in the editorial board of «Zláté Klasy». By the end of the 1860s Podlipská had already deserved the reputation of the spiritual leader of Czech female movement[37]. Eliška Krásnohorská, younger writer, described Podlipská's authority «as the pavis and a kind of fortification for the girls who were interested in literature and need encouragement»[38]. «Women's right to express themselves as citizens and holders of civil rights imposed a condition: that their specific voice should give way to the dominant symbolic discourse»[39], and despite mutual contest both female writers promoted the priority of family life and maternity as core of women's life – in line with the educational priorities of the male educators.

[34] R. Oudová, *Sofie Podlipská: Veřejná činnost ve světle dobových pramenů* [Sofie Podlipská: Public Activities in the Light of Historical Documents], Master Degree Thesis, Charles University, Prague, Faculty of Humanities, 2015, p. 92.

[35] E. Luštincová, *Život, dílo a odkaz Věnceslavy Lužické* [Life, work, and legacy of Venceslava Lužická], Master Degree Thesis, University of Pardubice, Faculty of Humanities, 2010.

[36] Gustav Pfleger-Moravský (1833-1875) was a famous Czech writer one of the first narrators about urban working class.

[37] J. Vrajová, *Umělkyně dobra Sofie Podlipská. Kapitola z dějin literárního midcultu 19. století* [The artist of benignity Sofie Podlipská: from the history of literary midcult of the 19th century], Prague, Akropolis, 2017.

[38] E. Krásnohorská, *Črta k podobizně Náprstkově* [Touches to portrait of Náprstek], «Ženské listy», n. 4, 1897, pp. 1-3, 66-68, in particular p. 67.

[39] Finzi, *Female identity*, cit., p. 139.

2. *The bildungsroman in «Zláté Klasy»: becoming true czech woman*

2.1 *Devotion to the nation: the moral pulse of conduct fiction in «Zláté Klasy»*

Between 1867 and 1875 «Zlate Klasy», published four texts addressed to the issue of proper, Czech, mode of female coming-of-age. Three were written by Podlipská, the last by Lužická. These texts were in dialogue with one another, authors' experience, and readers' expectations.

The serialized story *Z denníku devatenáctileté dívky* (From the diary of nineteen-year old girl) was made up of three parts, *Přátelství a láska* (Friendship and Love, 1867), *Nevěsta* (Wife-to-be, 1868), *Slečny* (Young ladies, 1869)[40]. Pavlina, a girl from Bohemian periphery, tells her story of falling in love and being marriage. The plot scopes three years of her life, between her seventeen and nineteen. In the first part, the spate of inappropriate followers and the ways to manage communication with them obtained the central position. Learning how to choose proper man becomes a period of emancipating from the mother's influence. Pavlina described her mother as genius patriotess but also ready to relinquish her love to the Czech in favour of successful marriage of her daughter with wealthy even not Czech man. Under positive influence of her friend, older Cecilie, Pavlina learns to keep distance with unnatural and intrusive Podliska (literally "flatter"). She overcomes the inclination to weird rich Překot (literally "nihilist") who laughs on Pavlina's ideals. She rejects wealthy Uherský (literally "Hungarian") who insulted Pavlina's feeling of patriotism by sarcastic comments concerning Czech language and culture. Undoubtedly, she accuses Smola (literally "dirtiness tar"), very wealthy old merchant who has seduced a lot of girls but wants to marry beautiful virgin. Finally, Pavlina falls in love with young Czech physician Prokop Spěšný (literally "pioneer who hurries"). The meeting with her destiny man is not a final point but beginning of the second part.

Though Pavlina and Prokop recognize soon their mutual inclination, they decide to test their feelings. Examining feelings becomes the decisive for Pavlina. She not only copes with jealousy and the seduction to flirt with other men, but practices her housewife skills. In the last, the shortest part, already married Pavlina teaches her younger comrades what means to be true young lady – *slečna* (from the Czech *šlechta* – noble families). By criticising the obsession

[40] Though the journal did not provide the name of the author, it was Sofie Podlipská. Nine years after publishing the last part of *Z denníku* the chief editor of the journal, Suda asked Podlipská to repeat the success of *Denník* and develop something comparable with this text. The plot reproduces a love story of Podlipská and her husband, Josef Podlipský, who was a physician and activist of nationalist movement. Podlipská started to work on the text just after the death of her husband, and relying on their story can be seen as a tribute to their marriage. Even more the main male character, physician Spěšný, is named *Prokop* – as the son of Podlipska.

by all German among those girls who pretend to be ladies, Pavlina concluded her diary by saying pathetically: «The girl of any origin and any position, you would be lady for us if you would be educated in the Czech way, having the Czech heart, and Czech morality, encourage Czech by your words, patterns and actions»[41].

První sny divčí a škola života (First dreams of girls and school of life, 1870) by Podlipská starts by the moment of preparing three schoolmates to their first ball. Anděla (literally "angel") is the only daughter of wealthy owner of several ventures. Růžena (literally "rose") is the oldest daughter of middle-class merchant. And Doubravka (literally "oak") is a poor orphan who lives together with her aunt, an old maid. While Anděla and Růžena prepare their best dresses, Doubravka gains modest dark silk dress from her aunt who considers that the dress should be worn as long as possible. The night before the ball Doubravka sees the dream in which her aunt looks younger and tells to Doubravka that she would meet her first love soon.

During the ball, the Doubravka's aunt gets stroke, and the girl has to abandon the ball to care for her aunt. Doubravka recognizes her deep feeling of love to her aunt whom she is able to recover. Along with it, her mates experience their first "proper" love affairs. Not too wealthy but ambitious young lawyer Jaromir falls in love to Anděla, and his friend – to Růžena. First time in her life, Anděla faces the intolerant attitude of her parents to her wishes – they want to marry her to wealthy colleague of her father, Mr. Novak. Jaromir behaves himself too emotionally when he recognizes that Anděla shares his letters with her parents, and Anděla starts to feel doubts. She spends more and more time with Doubravka, who selflessly serves to her aunt. In moment when Anděla asks Doubravka what to do, her aunt decides to give away her own story of first love. She was in love with Doubravka's father who betrays their love under the pressure of frivolous emotions to Doubravka's mother with whom he has met during the ball, nice noble woman but who was unable to understand her husband. Because of mutual lack of recognition, Doubravka's father chooses the work expecting long-term trips abroad, where he has lost his health, after his death and the death of his wife, the "aunt" adopts Doubravka. The dying lady finishes her story by telling to Anděla to listen to her heart and not be rush.

The aunt dies, and her sister with her son, Vit, who are heirs of the aunt's property, arrive. Doubravka has deserved the trust of the aunt's sister, Blahá (literally "good"), despite previous prejudice against Doubravka as a source of fruitless pedagogical efforts by her sister. Even more, Blahá informs Doubravka, that her aunt required Vit to marriage with Doubravka as the prerequisite for getting inheritance. Nevertheless, Doubravka refutes this offer and starts to work as governess in the family of Czech patriot. When the family of her educatees transfers to Prague, Doubravka gets back together with Blahá and Vit,

[41] *Z denníku*, cit., 1869. p. 62.

who falls in love and informally educates Doubravka. Because of her modesty, Doubravka fears to obtrusive, and Vit starts to feel himself being neglect by Doubravka. After overt mutual explanations they decide to marry. In her turn, Anděla starts to help her father in his enterprise and learns a lot during the period when the family's busyness remains at risk of bankruptcy, also Jaromir recognizes the call for accepting the responsibility and becomes a successful lawyer, and they pass through different tests on mutual understanding and marry too. Only Růžena who remains selfish and superficial disappears from the narration being sentenced to pretend love and never deserve proper happiness.

Naše Mařenka: dívčí obrázek (Our Marzhenka. The story of the girl, 1871) by Podlipská addresses the issue of social lift for rural girls. Mařenka, twelve-year oldest daughter of farmer Záhorský, has already finished compulsory school attendance, but her only dream is to continue education. Her uncle, the father's brother, who is a Professor in Prague, and her aunt offer to take Mařenka to Prague and give a chance to continue her education there. Mařenka's mother is intimidated by such perspective – because her oldest daughter should be prepared for rural life not for reading «books which have magic power to pull in other world and leave there»[42]. Mařenka has persuaded her mom by saying that she has not only good will but strong will and would be able to combine both great interests of her life, education and family.

In Prague Mařenka faces the issue of distributing her time between studying and housekeeping, but she has learnt to organize her daily schedule in favour of being able not only to learn but do such female routine as handiwork and cooking. After completing three years in private school in Prague she returns to her parental family and needs to reorganize her life again – by submitting her educational activities to her routine duties. Several times Mařenka has to choose between reading book and spending time together with younger siblings, writing letter and helping her mom, and each moment by prioritising her family obligations, she gets more pleasure by being back to her enlightened activities.

The priority of family and practicing strong will obviously rescue Mařenka in the most dramatic moment of narration, the betrayal of Zděnek, the stepson of her uncle and aunt who has thought better of marrying to Mařenka. Though his stepparents do not share his desire to marry wealthy woman, they are unable to influence his decision. In order to encourage and empower disappointed Mařenka, her father sets trees to her small flower garden as a kind of remedial activity for the girl. The novel ends by the rhetorical question: «I suppose, my dear readers, you want to know has Mařenka married? She does not rush, she is quiet at home, cares about her garden, and she is the second mother to her siblings»[43].

[42] S. Podlipská, *Naše Mařenka: dívčí obrázek*, «Zlaté Klasy», 1871, pp. 31-66, in particular pp. 35-36.

[43] *Ibid*.

První báseň: rodinný obrázek (The first poem. The family story, 1875) by Lužická addresses the continuity of pre-marriage stage of women's education and their family life. The reader meets Rezina Blažková, only daughter of Mr.Blažek, a local flour seller, in moment of the highest excitement – she has already met the man who seems to become right man of her life, mysterious young guest of local priest. He looks like a poet which means the highest degree of attractiveness to Rezina. Indeed, professor Velenský from Prague is known for Rezina under his pen-name, Javorský, and he is one of her favourite poets. Velenský attends the Rezina's family and next day meets her in her garden, they have romantic talk about the moments of happiness and poetry which fixes these moments in memories. Answering to Rezinka's call for everlasting happiness, Velenský asks to write the poem about this particular moment: «In evening calm atmosphere you will sink to the deeps of your soul and write in quite aloneness»[44]. He presents it as a kind of home-task which should be performed next morning.

With troubles Rezinka finds two clean sheets of paper and only one old pencil, but she has written her first poem. Next morning after practicing her day routine as housekeeper, she is late, and facing the poet's impatience, she explains that her home obligations are her top priority. Then she passes her poem to Velenský. Immediately after reading, Velenský proposes her – because of her excitement she finds her bread rolls totally burned – «sacrificed to her marriage». Rezina believes that her poem has inclined Velenský to marry with her, though during their engagement party he asks not to write more.

Then the text shifts the readers to Prague flat of Velenský family – young partners expect the visit of Rezina's parents who would to meet their first grandson but also participate the anniversary of Jungmann in Prague. Rezina tries her best in order to prepare the best dinner and asks her husband to give her old papers for biking cakes. Soon she recognizes that her husband has given her fist poem. She is deeply insulted because love is over, but keeps her bravery and accepts her obligations. Soon Velenský discloses the reasons of his wife coldness and even he apologizes for giving her «this piece of paper», he explains that not her poem which «is not poem at all but the expression of young girl's feeling» inclined him to marry her, but her beauty, kind soul, and last but not least the devotion to her obligations. Along with it, he adds that he would never marry to «real female poet». Rezina is happy – she has recognized the sustainable grounds of their love. In the very final, Velenský shares the story of the first poem to Rezina's parents and offers the toast for the first and last poem by his wife.

[44] V. Lužická, *První báseň: rodinný obrázek*, «Zlaté Klasy», 1875, pp. 47-80, in particular p. 59.

2.2 *«Your most duty is to recognize yourself». Adapting the frames of bildungsroman*

All four texts reproduce the core of Bildungsroman, learning to be the Czech woman «as a process of organic or quasi-organic development»[45]. The texts emphasize only one central figure – female protagonist, though *První sny* tells the story of three girls, Doubravka remains the only protagonist. The texts embed the identity of Czech woman into the whole range of cultural contexts of Czech Revival in order to achieve that degree of psychological depth that demonstrates continuous and gradual changes of the main character towards becoming true Czech woman. While in *Denník* and *První báseň*, the husband remains the main driving force of such formation, in *Mařenka* and *První sny* the extended social networking is involved into formatting main character. It stresses the crucial period of adolescence what is typical of Enlightenment anthropology, the most influential source of European Bildungsroman. All texts interpret the development of the main characters not as a process of social or biological determination but formation of an individual personality inseparable to the idea of national emancipation. All text end as Bildungsroman – with the protagonist's integration into the Czech society after accepting by the protagonists «the most important duty is to recognize yourself and prevent from being forced by circumstances»[46].

Approaching same mission, these texts dovetailed with different well-known frames and plots of European romantic bildungsroman. Mixing Socratic dialogues, the frames of fairy tales' plots, romantic fiction generally shaped the main trajectories of Czech conduct fiction in favour to keep the attention of the readers as well as achieving persuasiveness[47]. Also, the mission to (re)educate submitted the adaptation of various genres to the expectations from conduct fiction. In her essay *Reading and Life* published the same year of the first part of *Denník*, Podlipská emphasised the threat of overflowing the literature across the world by superficial texts aimed at only amusing what especially affects

[45] M. Engel, *Variants of the Romantic Bildungsroman*, in G. Gillespie, M. Engel, B. Dieterle (edd.), *Romantic Prose Fiction*, John Benjamins Publishing, 2008, pp. 263-295, in particular pp. 264-265.

[46] Ž. Podlipská, *První sny divčí a škola života*, «Zlaté Klasy», 1870, pp. 24-109, in particular p. 66.

[47] V. Brožová, *Povídka v pedagogikém časopisu druhé poloviny 19. století (na příkladu Štěpnice, dětské přílohy časopsisu Škola a život)* [Short story in pedagogical journals in the second half of the XIX century (The case of Štěpnice, children's supplement to the journal School and Life)], in M. Jareš, P. Janáček, P. Šámal, *Povídka, román a periodický tisk v 19. a 20.století*, [Story, novel and perodicals in the XIX and XX centuries] Sborník příspěvků ze sympozia pořádaného oddělením pro výzkum literární kultury ÚČL AV ČR v Praze 13.-14. října 2004 [The collection of presentations to the Symposium organised by the Department of the Studies of Literary Culture], Prague, ÚČL AV ČR, 2005, pp. 53-73.

young female readers[48]. In contrast to «this pernicious reading full of the enticements», Podlipská emphasizes the role of literature as «the highest school of human behaviour which contests the unhappy destiny of the nation by the truth and beauty»[49].

One of the main implications of this intention was consistent gender-based differentiation in using romantic tropes – while male characters reproduced the clichés of romantic Bildungsroman, the female characters should be emancipated from the romantic expectations seen as false and pestilent. The positive male characters obtain their attractiveness as romantic heroes. Vit has a big portion of resemblance with Mr. Darcy, an archetype of the aloof romantic hero, who devotes himself to his studies and avoid any flirt, respects his mom and his aunt, but not young coquettish girls. Prokop Spěšný is an orphan, common figure for romantic novels, and Pavlina's love is supposed to give him what he lacks. Velenský is described as young mysterious handsome stranger. The negative male characters like Překot are those nihilists whose attractiveness reverberates with their immoral attitudes what makes them uneducable.

A dominant trope of romantic genre, idealized representation of artists and poets «as hero, sage, priest, messiah, superman, and privileged decipherer of nature's immanence and meaning»[50] had positive connotation exceptionally with male characters while the female protagonists who try to be poets become the subject of disciplining humour – as Rezina. The romantic motive of love female writing familiar from *Eugen Onegin* operated in opposite direction to Tatyana's letter to Onegin – instead shedding light on the Tatyana's personality *První báseň* emphasises the exceptionality of male protagonist. The readers never read the poem by Rezina – for them it is enough to know the sceptic opinion of the expert, her husband. *Denník* and *První báseň* reproduced the situation familiar for Podlipská and Lužická: the male editors were those who made decision about the value of female's writings. Pavlina makes the decision to publish her diary under direct supervision of her brother, and her husband persuades her to continue her literal career after marriage by saying: «You should be Martha but along with it Maria too – our situation calls for it!»[51].

Submitting female writing to the interests of the nation strictly regulated women's imagination. Utilitarian view on female writings was a part of the strategy aimed at attacking the romantic cliché of the woman in love – who is ready to sacrifice everything for her love. Podlipská and Lužická kept the conduct part of this trop which sentenced such characters to be unhappy even

[48] S. Podlipská, *Čtení a život* [Reading and Life], «Květy», vol. 3, n. 48, 1868, pp. 379-381, in particular p. 381.

[49] *Ibid*.

[50] G. Gillespie, M. Engel, B. Dieterle (edd.), *Romantic Prose Fiction*, John Benjamins Publishing, 2008, p. 40.

[51] Differentiating two roles, Martha and Maria, stems from the dichotomy of the active versus the contemplative aspects of Christian faith.

to die because of love, but in the Czech texts it was exaggerated in favour of satirizing such pattern as artificial. Laughing on the inclination of the Czech women to such clichés was well-embedded into the Czech humour: mockery concerning meaningless fashion, the inclination to romantic literature, neglecting housekeeping in favour of entertainment was one of the most mainstream topics of the Czech humour periodicals since the 1850s[52]. But in the conduct fiction published in «Zlate Klasy», this motive started to be linked with proper national identity. In the most dramatic moments of her life, first meeting Velenský, disclosing his "betrayal", Rezina compares her destiny with the story of her peer, Dvorská, who together with her future husband were *jeunes premiers* in local amateur theatre and who «continued to play the theatre after wedding» what inevitable crashed their marriage. Andela is taught by Doubravka's aunt from opposing her attitude to love against the attitude of Růžena: «You so dislike Růžena because she devotes herself only to this idea of *soi-disant* love»[53].

Not only romantic plots but romantic symbols were transformed in favour of the mission to emancipate female readers from romantic influence. Doubravka decorates herself by two camellias, white and red, as Louise de Chaulieu from *Mémoires de deux jeunes mariées* (Letters of Two Brides) by Honoré de Balzac. While Louise uses flowers for communicating her lover and testing his feelings (white flower supposes to meant indifference and red – love, and Louise makes her choice just in front of lover's eyes simultaneously observing him). Doubravka does not use this symbolic language – next morning after the ball she finds the flowers still fresh what is accepted as good sign for her aunt's remedy.

While romantic love is seen as artificial, the bourgeois ideal of economic pragmatism is embedded into the mission to serve the interests of the male patriots who save the nations. Doubravka is the antipode to female pettiness, a quality which was seen as a main negative output of "align" education: «Now we know Doubravka is neither selfish nor whimsical and she is not expecting that men would put her in the centre of their life – *vice versa* she is ready and happy to sacrifice her life to the flow of her husband activity on favour of humanity»[54].

Attacking artificial Romantism addresses those men who abuse it in favour of impressing and seducing young women. Podlipská laughs at Podliska whose artificial manner to express love irritates Pavlina: «His speech was fatuous and intimidating. He told that he would be ready to go together with me until

[52] Hemelíková, *Paleček mezi Dickensem a Saphirem (k tematice prvního českého specializovaného časopisu pro humor)* [*Paleček* between Dickens and Saphir: About the first Czech humoristic magazin], cit., pp. 42-52, in particular p. 46.

[53] Podlipská, *Divčí sny*, cit., p. 66.

[54] *Ibid*., p. 108.

Judgement day, that I would be his ambrosia, his celestial divine, and I answered that I do not wish to him to keep fast such long»[55].

Emancipating female protagonists from baneful influence of Romantism called for indicating alternative way to make them attractive and desirable behavioural models for the readers – and the solution stemmed from romantic cliché of supernatural woman. Podlipská and Lužická prescribed to their heroines to be mysteriously attractive female figures. This turn inclined to elaborate the motive of indispensible supervision of female protagonists – in their favour and favour of the nation.

2.3 *«She is a true women even more Czech!». Female embodiment between admiration and supervision*

Celebrating the female attractivness as a congenital to the Czech nation accompanies all texts. In the introductory paragraph of *Mařenka* Podlipská directly mentions the definition "our" as the most visible evidence «that everybody likes Mařenka and it is a kind of the highest possible accolade to her». The readers experience outstanding attractiveness of protagonists not from the detailed description of the look but the admiration of the men and envy of the female peers. The female protagonists look voluptuous during their routine life – mainly when they cook. The impression of Jaromir from his fiancée Anděla who is cooking dinner, reflects the resonance of authentic femininity and belongings to the nation: «She is a true women even more the Czech!». Pavlina prepares Christmas Eve dinner – for the first official visit of Spěšný to Pavlina's parental family. Baking frames the love story of Rezina and Velenský. While in British women's fiction «female sexual appetite is often displaced onto food or coded through the heroine or author's response to food»[56], linking culinary skills and sexappeal of Czech female characters should persuade the readers that not physical attractivness but naturleness and authenicity are the core of the main characters' charm. According to Bourdieu, such quotidian realms like cookery, fashion, or decorating operate as "systems of difference"[57], and the attractivness of Czech female protagonists who perfomed such routine as cooking was opposed to artificial behaviour of those who reject Czechness.

Negative female characters are described as potentially more physically attractive but hopelessly artificial:

[55] *Z denníku*, 1867, cit., pp. 8-9.

[56] S. Moss, *Spilling the Beans: Eating, Cooking, Reading and Writing in British Women's Fiction, 1770-1830*, Manchester, Manchester University Press, 2009.

[57] P. Bourdieu, *Distinction: A social critique of the Judgement of Taste*, Cambridge MA, Harvard University Press, 1984, p. 227.

Růžena could be more beautiful than Anděla because her nose was straighter, and her skin was whiter, and she was thinner, but the expression of her face was not nice. Everything in her outfit was exaggerated: her nice hair was backcomb, and the roses decorate it as big hats, she decorated herself by each of her family jewellery, and she sewed dozens of pink ribbon on her white dress. She poised her heard as a private in marsh, and she was walking with the feeling that each of her steps means something outstanding for the whole world[58].

Opposing true, Czech, attractiveness to artificial, anti-Czech, beauty consistently performs in *Denník*. The best friend of Pavlina, Cecilie Valinova, is described as antipode to pseudo-attractiveness: «She doesn't perform, doesn't sing and dance. She has neither talent nor profession»[59]. Even more, Cecilie has lost massive part of her attractiveness after smallpox, but Podlipská prescribes Cecilie female happiness – her fiancé loves her for her Czech soul and wisdom, and they marry in the end of the first part of the text. Agnes Vrbíková, main competitress of Pavlina, a local star of German amateur theatre who disseminates slander about Pavlina, finally falls in love to Spěšný and pretends to be true Czech woman, but she is broken down because of exaggerating and looking odd: «She was dressed in čamara[60], and Slovak hat was on her head, and the ribbons which decorated her dress were also Slovak».

Prescribed to the true Czech women naturalness was easily transformed into supra-naturalness – extraordinary sex appeal of main characters: Pavlina and Rezina are described as the most desirable girls in their locality. Also, their attractiveness contrasts with fragmentary mentioning of their sexuality[61]. Probably, the most eroticized scene is embroidering the shirt for farther by Pavlina who decides to imagine how it would be if she would be embroidering the shirt for Prokop: «I have taken my tin pencil and drown on the linen P.S. I liked it so much that I have in to temptation to stitch it by red silk. Really, I did not know what I was doing but I was just watching and was happy»[62]. The readers could guess that Pavlina has sexual desire to Překot whom she finds mysterious but consistently rejects because of his attacks against Czech patriotism and her piousness. After internal struggle, romantic interest to Překot reverses into ardent hate on him and other Czechs who support Germanness because «they despise us, inhibit out intentions, suspect us, hurt us, push us aside, would like to oppress and exterminate us if they could»[63].

58 Podlipská, *Dívčí sny*, cit., pp. 36-37.

59 *Z denníku*, 1867, cit., p. 12.

60 A kind of black male overcoat which originally was worn as festal dress, bit in the 1860s started to be a part of dress code for the Czech young nationalists, both men and women.

61 In this point the texts by Podlipská and Lužická were in opposition to the grand female Czech literature with it particular focus on women's sexuality, more in A. Thomas, *The Bohemian body: gender and sexuality in modern Czech Culture*, Wiskonsia, The University of Wisconsin Press, 2007.

62 *Z denníku*, 1868, cit., p. 66.

63 *Ibid*., p. 85.

The call for tough supervision of the female character due to her "sleeping" sexuality, a motive well known from *Pamela; or, Virtue Rewarded* by Samuel Richardson[64], gets its specific trajectory in the Czech texts. Such supervision aimed to protect Czech women from possible threat to be alienated by foreigners, mainly Germans. Pavlina is surrounded by the men who directly challenge her Czech identity. Not only pro-German Překot but Uherský humiliates the Czech patriots: «you dream to whistle in Czech, meow in Czech, growl in Czech. Only Czech fatherland and Czech language are in your minds. It is total foolishness – and you humiliate us – those who are well educated and who do not expect redemption from being Czech»[65].

Emancipating from the risk to be seduced by anti-Czechs leads to the paradox with the freedom, well-known from Western female Bildungsroman in which «externally imposed repression reappeared as self-discipline and self-control»[66]. As a governess Doubravka attracts the attention of the steward of the estate. Facing Doubravka's thwart, the steward decides to provoke her jeloucy – he starts to ignore Doubravka, and she feels herself insulted. In moment when she recognizes that she is not in love with the steward, she discloses herself as a flirtatious woman who wishes to be loved instead to serve to those whom she would truly love. The outputs of practicing self-imposed limitations are visible: for instance, Rezina and Doubravka achieve much better social status than at the beginning of narration. This *Cinderella-Like* plot faced the issue of social stratification among the Czechs especially women and the task to indicate the ways of uniting those who belonged to the same nation but different classes.

2.4 *«There is no alienation among us». Pedagogy of nation vs. class*

Among various educational outcomes, European conduct fiction for middle-class girls prescribed to experience the destiny of different social groups – in order to teach the girls to proper attitude to poverty and charity. In *Diary* Pavlina and Prokop meet each other in the house of poor and seriously sick widow Prudilová. The readers familiar with Jane Austen's novels easily recognise the echo of *Emma* – an exceptional scene of a charitable visit of destitute working-class family, suffering «sickness and poverty together» aimed at distinguishing between good and bad ways of giving charity[67]. While Emma's visit to the poor family is an example of improper behaviour, Pavlina's approach deserves the

[64] T. Keymer, P. Sabor, *Pamela in the Marketplace: literary controversy and print culture in eighteenth-century Britain and Ireland*, Cambridge, Cambridge University Press, 2005.

[65] *Z denníku*, 1867, cit., p. 32.

[66] Finzi, *Female identity*, cit., p. 131.

[67] J. Nardin, *Charity in "Emma"*, «Studies in the Novel», vol. 7 n. 1, 1975, pp. 61-72.

Prokop's respect and reinforces their mutual attraction. Also, in contrast to Austen who brought forward the issue of proto-eugenic view of high class on underclass as originally immoral, Podlipská focused on the unhappy destiny and ruined family bonds what would lead readers to explain poverty by the lack of unity between lower and higher social groups of Czechs – who stopped to be one family. Being recovered by Prokop, Prudilová starts to work as the servant for Pavlina and her husband. This idyll reverberates with peaceful picture of uniting the Czech girls from different social groups in the Church: «Servants were closer to the priest then mistresses, seamstresses and laundry girls were staying in front of those to whom they served»[68]. Total eclogue characterises the relation between Mařenka's father, a farmer, and his brother, a Professor from Prague.

Celebrating the belonging to the nation as the prerequisite for equality culminates in the last paragraph of *Diary*: «The authentic young lady can be a daughter of governing officer, or craftsman, or farmer – the matter is to have educated mind – vulgar non-educated and non-enlightened girl is not lady!»[69] The improper attitude to the Czech language as a language of servants and underclass is seen as the main obstacle in educating the Czechs: «Do not our girls speak Czech? No, they speak – they are Czechs, but even worse than German. With whom they speak Czech? Only with the servants and those who only speak Czech. The language rules do not matter – while it is enough for chambermaids»[70].

Despite experiencing national unity, the texts abided by class's difference. During the Easter Vigil Pavlina observes the difference among the girls: «Some had hats, others – simple caps, and the rest – just kerchiefs. Some were dressed as town girls, but others – country-like. Some were distinguished by their jewelry and wealthy, others were the impersonation of poverty though they had their best dresses»[71]. Though Pavlina claims: «There is no alienation among us, nobody gave any preference to somebody»[72], coalescing gender and class fixes the difference in the social trajectories of female characters. While Pavlina and Anděla who belong to higher middle class are involved into male world full of public activity, poor Doubravka and Rezina are sentenced to serve the interests of the nation as wives and mothers. «Nobody would face your desires but you will have to obey to the desires of others»[73], – the aunt says to Doubravka, and the only option available to Doubravka is to find those whose desires would be proper – in terms of the nation. The future of Mařenka who experiences different live conditions remains uncertain even for the author – because there

[68] *Z denníku*, 1868, cit., p. 83.
[69] *Ibid*., p. 105.
[70] *Ibid*., p. 98.
[71] *Ibid*., p. 82.
[72] *Ibid*.
[73] Podlipská, *Dívčí sny*, cit., p. 34.

is no particular place for her in the social hierarchy introduced in the texts. Obviously, prescribing to readers to feel frustration because of Mařenka's destiny can be seen as the «ground on which the transformation ability of the bourgeois revolution was to be tested»[74].

Conclusion

The main driving force of establishing the Czech bildungsroman was the intention of political and cultural elites to replace the influence of German mass culture with native texts for translating the relevant national ideology. Though from the very beginning Bildungsroman aimed to wake up female audience and emancipate it from the pressure of Germanness, then its trajectory reproduced the vicissitudes of the genres which served ideological interests and inclined the audience accept deceptive non-solutions. The resonance between the interests of culture makers and political motives shaped several generations of female bildungsroman as an especially significant genre for translating the state's agenda.

Publishing conduct fiction in «Zlate Klasy», can be seen as one of the most consistent cases of submitting feminist agenda to the interests of nationalistic movement. The Czech male educators were those who ordered and the Czech female writers were those who implemented the request to bring up the Czech girls in line with nationalist agenda. Comparably with the female writers from other countries, Podlipská and Lužická instrumentalised gender to construct nationalist narratives and establish their own legitimacy within dominant discourses[75]. Their texts do not keep a critical distance from the doctrines such as the gender dichotomy what is «one of the principal charms of literature»[76]. Losing this charm helped to start the pathway of conduct fiction which shaped the intersectionality of gender, class and nation as a source for producing onefold pedagogical emotions amongst the female readers.

After testing this strategy in cooperation with «Zlate Klasy», Podlipská and Lužická expanded it within their own publishing projects aimed at educating and amusing. Still further, Podlipská and Lužická introduced performing and interacting with audience that accompanied narrating as the main mode of engagement[77]. While Podlipská tried to elaborate the journal which would

[74] Finzi, *Female identity*, cit., p. 129.

[75] G. Horan, *Discourses of gender and nationalism in early twentieth-century Germany and Ireland: an analysis of four nationalist women's texts*, «Patterns of Prejudice», vol. 45, n. 5, 2011, pp. 469-497.

[76] T. Klinkert, W. Willms, *Romantic gender and sexuality*, in Gillespie *et alii* (edd.), cit., pp. 226-248, in particular p. 247.

[77] T. Riedlbauchová, *Žena-vzor a žena-problém. Obrazy žen v konvenční a umělecké povídce*

introduce female readers in the literal world, in her journal «Lada» Lužická combined teaching of housekeeping with conduct entertainment. Along with it, she established the canon of *Červená knihovna* – the Czech love romance story. Obviously, long-term popularity of both writers and their conduct fiction shaped the elaboration of female Bildungsroman by next generations of the writers.

v Kalendáři paní a dívek českých z let 1894-1897 [Woman-Benchmark and Woman-Issue: the images of women in mass and artistic stories in the Calendar for the Czech women and girls between 1894 and 1897] in M. Jareš *et alii*, cit., pp. 102-115.

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Teaching history of art in European universities and high schools in the light of a 1914 investigation

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ABSTRACT: Based on the results of an investigation, which was launched by the «Revue de synthèse historique» in February 1914 on the way *art history* was taught in European universities and high schools, the author examines the European debate on the role which the discipline played in different countries and the issues relating to the new epistemological profile taken on by art history at the turn of 19th-20th centuries.

EET/TEE KEYWORDS: Art history; History of University; Higher and university education; Europe; XIXth-XXth Centuries.

Introduction

In February 1914, the «Revue de synthèse historique», an interdisciplinary periodical founded by the philosopher Henri Berr in 1900, published an issue entirely devoted to art history, which was divided into a methodological discussion section[1] and an international survey on higher education for art history in several European countries[2].

[1] With the following contributions: V. Chabot, *Les méthodes archéologiques*, which has a critical discussion of the text by W. Déonna, *L'archéologie. Sa valeur, ses méthodes*, Paris, H. Laurens, 1912; L. Hourticq, *La méthode en Histoire de l'art*; and L. Réau, *Un théoricien de l'Histoire de l'art: Hans Tietze*. This last contribution was devoted to a close examination of the book, which has just been published by H. Tietze, *Die Methode der Kunstgeschichte. Ein Versuch*, Leipzig, Seemann, 1913.

[2] *L'Enseignement de l'Histoire de l'art*, «Revue de synthèse historique», vol. 28, n. 82, 1914, pp. 51-110. For the «Revue de Synthèse Historique» by Henri Berr, see A. Biard, D. Bourel, E. Brian (edd.), *Henri Berr et la culture du XXe siècle. Histoire, science et philosophie. Actes du*

An important precedent for this initiative was the discussion devoted to *Posizione della Storia dell'arte* [Position of history of art], desired and chaired by Adolfo Venturi during the 10th International Congress for history of art, held in Rome in October 1912, when an embryonic transnational confrontation about teaching history of art in schools and universities was launched, since «it is, therefore, necessary to look for a balance in all the countries all over Europe to teach History of Art», as Venturi himself underlined on that occasion[3]. This working session ended with a motion prepared by the Italian scholar himself, where governments were asked to introduce a similar teaching in all the universities, polytechnics, schools for engineers (replacing the traditional study of architectural styles with history of architectural art), as well as schools of fine arts and ecclesiastical seminaries. Furthermore, as regards high schools, where the discussion of issues related to History of Art was often entrusted to teachers of history or literature, this need was emphasized not only to independently establish this subject, but also to attribute its teaching to teachers with a specialized training[4].

After all, these were the crucial, 'glorious' years for this discipline, when a rapid increase in professorships and students was recorded throughout Europe; a process which led to an increasingly subtle and lively methodological discussion on the one hand and a demanding reflection on the professional figure of art historians on the other hand[5].

During the above-mentioned session of the 10th International Congress for history of art held in Rome in 1912, however, a substantial lack of homogeneity in professorships in European universities had also emerged: while art history was present in almost all the universities and high schools in Germany[6] and the Hapsburg Empire and this discipline was rapidly spreading both in universities,

colloque international 24-26 octobre 1994, Paris, Albin Michel, 1997.

[3] This discussion is transcribed in the acts of the congress in 1912, published a decade later: *L'Italia e l'arte straniera. Atti del X Congresso Internazionale di Storia dell'Arte in Roma*, Rome, Maglione & Strini, 1922, pp. 21-42, cit. p. 21; about the congress, see S.A. Meyer, *L'Italia e l'arte straniera. Temi, polemiche e prospettive del X Congresso internazionale di storia dell'arte (Roma 1912)*, «Annali di critica d'arte», vol. IX, n. 1, 2013, pp. 333-346; C. Cieri Via, E. Kieven, A. Nova (edd.), *Atti dei convegni Lincei (289). L'Italia e l'arte straniera. La storia dell'arte e le sue frontiere. A cento anni dal X Congresso Internazionale di Storia dell'Arte in Roma (1912). Un bilancio storiografico e una riflessione del presente (Roma, 23-24 novembre 2012)*, Rome, Bardi Edizioni, 2015. A comprehensive study of the 1912 congress is being prepared by the writer.

[4] *L'Italia e l'arte straniera*, cit., pp. 41-42.

[5] S.A. Meyer, *La storia dell'arte tra Nationbuilding e studio della forma*, in O. Rossi Pinelli (ed.), *La Storia delle Storie dell'arte*, Turin, Einaudi, pp. 239-319, in partic. pp. 239-244; M. Passini, *L'œil et l'archive. Une histoire de l'histoire de l'art*, Paris, La Découverte, 2017, in partic. pp. 13-32.

[6] In his lecture on the position of art history at German universities to the 10th International Congress for History of Art, Wilhelm Waetzoldt speaks about a total of 132 teachers working in 53 universities or high schools for the German Empire, including 27 full professors and 15 extraordinary professors. W. Waetzoldt, *La posizione della Storia dell'arte nelle scuole superiori tedesche*, in *L'Italia e l'arte straniera*, cit., pp. 24-32.

Grand Écoles and academies in France, such a teaching was not very present in Italy and most of the other European countries yet and was struggling to be counted among academic disciplines in its own right.

As it has been said, a year and a half after the Roman assembly, the issue of teaching history of art was, therefore, taken up by the French magazine «Revue de synthèse historique» with an extensive survey on teaching art history in France, Germany, England, Austria, Belgium, Italy and Switzerland[7].

In France there was Gaston Brière (1871-1962), *Conservateur* of the Musée de Versailles and Professor of history of painting at the *École du Louvre* from 1911 to 1938; Henri Focillon (1881-1943), Director of the Musée des Beaux-Arts in Lyon from 1913 and Professor of history of art at the university of the same city, before being called to hold a chair at the Sorbonne in 1925[8]; and François Benoit (1870-1947), who held the chair of history of art at the University of Lille since 1905[9].

In Germany there was August Schmarsow (1853-1936), Professor of history of art at the University of Leipzig from 1893 to 1919 and promoter of the *Kunsthistorisches Institut* in Florence, founded in 1897[10]; while Hans Tietze (1880-1954), a young pupil of Franz Wickhoff and Alois Riegl, lecturer in art history at the University of Wien since 1909 and, at that time, Max Dvořák's collaborator for the publication series *Österreichische Kunsttopographie*[11], took part in the investigation from Austria.

England was represented by Dugald Sutherland MacColl (1859-1948), painter, critic and art historian, *keeper* of the Tate Gallery from 1906 to 1911 and, then, of the Wallace Collection from 1911 to 1924. In Belgium there was Hippolyte Fierens-Gevaert (1870-1926), Professor at the University of Liège and Director of the Musées Royaux des Beaux-Arts de Belgique[12].

7 A quick summary of the investigation in «L'Arte. Rivista di storia dell'arte medievale e moderna», vol. 18, 1915, pp. 76-78.

8 See A. Thomine, Ch. Briend (edd.), *La vie des formes. Henri Focillon et les arts*, Gand, Snoeck, 2004.

9 L. Therrien, *L'histoire de l'art en France. Genèse d'une discipline universitaire*, Paris, Éd. du CTHS, 1998, *passim*; Benoit is also the author of the contribution L'Enseignement de l'histoire de l'art et l'institut d'histoire de l'art de l'université de Lille, «Revue Internationale de l'Enseignement», vol. 41, 1901, pp. 526-539.

10 About August Schmarsow, see A.-M. Châtelet, *August Schmarsow (1853-1936)*, in M. Espagne, B. Savoy (edd.), *Dictionnaire des historiens d'art allemands*, Paris, CNRS Editions, 2010, pp. 255-265; A. Emiliani, *August Schmarsow e l'incontro con l'arte di Federico Barocci (1909)*, Turin, Einaudi, 2010, pp. 7-20; A. Pinotti, *Body-building. August Schmarsow's «Kunstwissenschaft» Between Psychophysiology and Phenomenology*, in M.B. Frank, D. Adler, (edd.), *German Art History and Scientific Thought beyond Formalism*, Farnham, Ashgate, 2012, pp. 13-31; A. Castagnaro, *August Schmarsow dalla critica d'arte contemporanea alla Raumgestaltung*, Bari, Progedit, 2017.

11 About Hans Tietze, see R. Marchi, *Hans Tietze e la storia dell'arte come scienza dello spirito nella Vienna del primo Novecento*, «Arte lombarda», Ser. NS, vol. 110/111, 1994, pp. 55-66.

12 On Hippolyte Fierens-Gevaert cf. R. Pirenne, *In search of synthesis. Art history in Belgium*, in M. Rampley, Th. Lenain, H. Locher, A. Pinotti, Ch. Schoell-Glass, K. Zijlmans, *Art history and*

The case of Italy was illustrated by Adolfo Venturi (1856-1941), Professor at the Sapienza University of Rome and founding father of Italian art history[13]. Finally, in Switzerland, a young archaeology scholar, Waldemar Déonna (1880-1941), *Privatdozent* Archaeology at the Faculty of Arts at the University of Genève and future director of the Musée d'Art et d'Histoire and the Musée Archéologique of the same city[14], took the floor.

It is also a rather heterogeneous group of scholars from a generational and career point of view: in fact, if some participants, such as Venturi and Schmarsow, were full professors with a long and important educational and institutional experience behind them, others, such as Focillon, Tietze and Déonna, were at the beginning of their university career.

Given the nature of this investigation, the interventions have very different characteristics, the result of each scholar's different sensitivity and the chosen perspective to convey a picture of art history teaching in their respective countries. This makes rather complex any attempt to reconstruct an organic framework to teach history of art in Europe on the threshold of the World War I starting from this investigation. Moreover, the academic systems, the teaching and training models and the affirmation of art history as an independent discipline among school and university courses are too different in several countries.

Beyond the census of active chairs in European universities, it appears possible and illuminating to identify some *fils rouge* which connect the practical and conceptual junctions illustrated by the scholars involved in this investigation, through which it is possible to grasp the fragments of a transnational chased discourse concerning the statute of this discipline and the object of study (the work of art), as well as the role which art history plays in society. So, the kaleidoscopic reflection on the art historical education, starting from teaching practice and institutional organization, became an opportunity to understand the dynamics, expectations and idiosyncrasies characterizing it in the crucial years of European history.

visual studies in Europe. Transnational discourses and national frameworks, Leiden, Brill, 2012, pp. 275-285, in partic. pp. 276-279.

13 On Adolfo Venturi remains fundamental G. Agosti, *La nascita della storia dell'arte in Italia: Adolfo Venturi*, Venice, Marsilio, 1996; moreover: M. d'Onofrio (ed.), *Adolfo Venturi e la storia dell'arte oggi*, Modena, Panini, 2008.

14 J. Chamay, *Waldemar Deonna, archéologue et homme de musée*, «Genava», vol. 47, 1999, pp. 37-44; J. Chamay, Ch. Courtois, S. Rebetez (edd.), *Waldemar Deonna: un archéologue derrière l'objectif de 1903 à 1939*, catalogue of the exhibition (Musée d'art et d'histoire de Genève, 30 mars-27 août 2000), Genève, Musée d'art moderne et d'histoire, 2000.

1. *Art history and other humanities*

A first aspect, which clearly emerges in each contribution, concerns the disciplinary autonomy and the recognition of art history as a discipline both in school teaching and university education.

We are in the final phase of the long process which led the affirmation of art history among university disciplines and began about a century before with the call of the Italian-German painter Johann Dominicus Fiorillo to the prestigious Georg-August Universität in Göttingen as a specialist of the arts of design: starting from the 1790s, for the first time he had held a course in art history, which was aimed not at training artists, but «exercising the sense of beauty and training the spirit in general»[15].

In order to legitimize itself as a university discipline, in the following decades, art history had had to distance itself both from its traditional connotation of a knowledge aimed at training artists in art academies and its undue ancillary collocation among the auxiliary disciplines of the historical and literary sphere. Of course, such a challenge took on more problematic characteristics and results where the matter was referred to archaeology and history of ancient art.

While the recognition of art history among university disciplines in a German and Austrian context already appeared a fait accompli in 1914, also in view of the fact that most universities have special chairs, in other European countries the process was still ongoing or just beginning. With reference to the Austrian reality, August Tietze significantly claimed the creation of the first chair in art history in a «modern» university in 1853, with the call of Rudolf Eitelberger von Edelberg, as a Professor at the University of Wien[16].

Instead, in the same period, art history was struggling to establish itself as an autonomous discipline in university *curricula* in Great Britain, maintaining a strong link with other disciplines, first of all, archaeology[17]. As it can be seen from the picture drawn by Dugald Sutherland MacColl, historical-

[15] J.D. Fiorillo, *Ueber die Groteske. Einladungsblätter zu Vorlesungen über die Geschichte und Theorie der bildenden Künste*, Röttingen, 1791, p. 25, transl. in S.A. Meyer, *La storia delle arti del disegno (1798-1820) di Johann Dominicus Fiorillo. Con un'antologia di scritti*, San Giorgio di Piano (BO), Minerva, 2001, pp. 135-140.

[16] See J. von Schlosser, *Die Wiener Schule der Kunstgeschichte. Rückblick auf ein Säkulum deutscher Gelehrtenarbeit in Österreich*, «Mitteilungen des Österreichischen Instituts für Geschichtsforschung», suppl. 13, n. 2, 1934, pp. 145-228, transl. in *La scuola viennese di storia dell'arte*, in Id., *La storia dell'arte nelle esperienze e nei ricordi di un suo cultore*, anastatic reprint of the 1936 ed., Milan, Marinotti, 2013. About this episode and the beginning of the Wien School, see E. Kernbauer, K. Pokorny-Nagel, R. Rosenberg, J. Rüdiger, P. Werkner, T. Jenni (edd.), *Rudolf Eitelberger von Edelberg Netzwerker der Kunstwelt*, Wien, Böhlau Verlag, 2019.

[17] G. Pollock, *Art history and visual studies in Great Britain and Ireland*, in Rampley, Lenain, Locher, Pinotti, Schoell-Glass, Zijlmans, *Art history and visual studies in Europe*, cit., pp. 355-378; Ch. Whitehead, *Museums and the construction of disciplines. Art and archaeology in nineteenth-century Britain*, London, Duckworth, 2009.

artistic courses were activated in different institutions (universities, museums, academies), without a real common reference, a particularity which had to be also evaluated in the light of the fact that «dans les Universites anglaises, les cours memes d'histoire generale sont une innovation moderne», as the author emphasized[18].

In France, art history had already started to take part among university disciplines, as well as in the academies of fine arts and the articulated system of the *Grand Ècole*, including the *École du Louvre*, founded in 1882 and devoted to train the staff in national museums[19]. In 1891, the first course in History of Art given at the Sorbonne had been entrusted to Henry Lemonnier, which was initially included among the ones offered in the history course; only in 1899, a specific chair would have been established, to which a further chair in history of medieval art would be added in 1906.

In Belgium, the 1903 Royal Decree with the title *L'institution de grades et de diplomes scientifiques de candidat, de licencitè et de docteur en Art et Archeologie* had created the conditions for the establishment of a real university course of study in History of Art and, subsequently, in the wake of this innovation, in 1910 an Institute Superieur d'Art et d'Archeologie had been founded within the University of Liège[20].

In describing the Italian situation, Adolfo Venturi bitterly underlined the slow and belated introduction of art history among university disciplines: it had had to distance itself both from the type of knowledge given in academies and other specialized institutions for artistic training and the traditional teaching of a philosophical aesthetics, which was authoritatively professed at the universities of Naples and Bologna.

On this regard, it is worth remembering that Venturi himself had been the author and protagonist of the inclusion of the discipline in university *curricula*, becoming the holder of the first chair in history of art at the Sapienza University of Rome: in fact, after starting as a free lecturer in the Capitoline university in 1890, he had obtained the chair in history of medieval and modern art – the first one created in Italy – in the same university in 1901[21], with which a separation between history of modern and medieval art and history of ancient art had been also made for the first time.

As Venturi complained, despite the undoubted progress achieved, even in the recent Rava law in 1910, which rearranged study plans in various universities, only Italian literature, Latin literature, Greek literature and

18 D.S. Mac Coll, *En Angleterre*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 75.

19 Therrien, *L'histoire de l'art en France*, cit.

20 Pirenne, *In search of synthesis. Art history in Belgium*, cit., pp. 275-285.

21 M. Moretti, *Una cattedra per chiara fama. Alcuni documenti sulla 'carriera' di Adolfo Venturi e sull'insegnamento universitario della storia dell'arte in Italia (1889-1901)*, in G. Agosti (ed.), *4. Incontri venturiani. 22 gennaio, 11 giugno 1991*, Pisa, Scuola normale superiore, 1995, pp. 39-99; Agosti, *La nascita della storia dell'arte*, cit., pp. 153-154.

philosophy (theoretical philosophy or history of philosophy, according to the students' preference) had been classified as compulsory disciplines of the degree in Arts (Faculty of Arts and Philosophy), while art history had been once again considered as a complementary discipline, or included among the «specific disciplines for the studies in Modern Philology»[22].

From a census of the complex and articulated framework in Switzerland, a federal country characterized by deep differences among its several cantons, it emerged that history of art was present in some high schools, but it was always encapsulated in other subjects (history, literature, archaeology), while the courses offered in seven national universities mainly concerned ancient archaeology and Christian and national archaeology (history of modern and medieval art was almost exclusively taught at the University of Basel, where Jacob Burckhardt had held a chair until 1893). However, in view of this framework, the author of the note about Switzerland, the above-mentioned Déonna, had highlighted the importance of the newly created chair in ethnography and comparative history of civilizations, established at the University of Neuchâtel and entrusted to Arnold Van Gennep, the famous author of *Les Rites de passage* (1909), for the growth and cultural and scientific maturation of teaching art history at the university.

At this point, it seems interesting to more closely examine the reflections formulated by Venturi and Déonna, in order to highlight the importance of this historical-artistic discipline, whose teaching in European universities derived its legitimacy from the set of values, of which art and its centuries-old history were bearers.

Venturi, who had been engaged in an articulated project for *professionalization* in art history together with a solid scientific skill at least since the late 1880s, insisted on the close link between the protection of the national artistic heritage – and its identifying function codified in the volumes of *Storia dell'arte Italiana* – and teaching history of art in schools and universities[23]. While in his intervention at the Roman congress in 1912 he had almost omitted to mention this link, in his contribution to the 1914 investigation it was strongly reiterated and the scholar repeatedly recalled the difficulty in making it clear that the study of medieval and modern art had given «figure et couleur aux 'idéalités'

22 On this regard, see *Regolamento Speciale per la Facoltà di Filosofia e Lettere*, «Gazzetta Ufficiale del Regno d'Italia», n. 281, 1910, pp. 6501-6503.

23 D. Levi, *L'affermazione di una figura professionale. Lo storico dell'arte fra tutela e insegnamento*, «Annali di critica d'arte», vol. IX, n. 2, 2013, pp. 15-29, in partic. p. 26; moreover, see S. Valeri (ed.), *Adolfo Venturi e l'insegnamento della storia dell'arte. Atti del convegno Roma, 14-15 dicembre 1992*, Rome, Lithos editore, 1996; M. Dalai Emiliani, *Il progetto culturale e l'azione istituzionale di Adolfo Venturi per la Storia dell'arte nell'Italia unita*, in D'Onofrio (ed.), *Adolfo Venturi e la storia dell'arte oggi*, cit., pp. 25-30.

nationales», that is why it had to be considered a fundamental element in young people's cultural education in every respect[24].

The lack of awareness for the historical-artistic value of monuments and works of art in Italy had been already previously identified by Venturi as the real cause of the dispersion for the private artistic heritage abroad and the poor protection granted by the country to public monuments. As a proof of this inseparable link, there was the fact that «les fastes de son [Italienne] histoire deviennent la spécialité de savants non-italiens»[25]. In 1887, this circumstance had been already complained by the scholar with a great disappointment in a famous and programmatic essay, *Per la storia dell'arte*, where he had evoked the paradox that the most important studies on Italian art had been published by foreign scholars[26].

In 1914, this contradiction finally appeared to be overcome thanks to the work of Venturi's students who, by virtue of their rigorously scientific education, had reached levels of competence, which were not dissimilar from those characterizing their German colleagues, as it had particularly emerged at the recent International Congress of Orientalists[27]. So, the controversy opened by Venturi with the above-mentioned essay in 1887 ended in this way – with an ideal «coup de piocche», according to what the author wrote. As Aby Warburg had observed with a lucid admiration in 1909, the transformation «of their art treasures for the good of the nation»[28], which was desired by Venturi's group, was the reason and the most authentic and incisive legitimacy of the disciplinary autonomy of art history in Italy.

Bringing his contribution from Geneva to the 1914 debate, the young Swiss archaeologist Waldemar Déonna's reflection was very different, because he was well aware of the peculiar nature of the Calvinist philosophy of art. First of all, he observed that it was necessary to question the old belief that art – and also history of art – is luxury in every respect, in order to reach the widest and the most shared recognition of art history.

Instead, the young archaeologist stressed that art is rather a necessity of social life and, therefore, had to be taught at all the levels like other humanities. Furthermore, he added that art is «d'essence populaire», not «d'essence

[24] Venturi, *En Italie*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 93.

[25] *Ibid*.

[26] A. Venturi, *Per la storia dell'arte*, «Rivista Storica Italiana», vol. IV, n. 2, 1887, pp. 229-250; see Agosti, *La nascita della storia dell'arte*, cit.; Levi, *L'affermazione di una figura professionale*, cit.

[27] Venturi, *En Italie*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 93. The reference in the text is perhaps to the XVI Congrès international des orientalistes, session d'Athènes (6-14 avril 1912). See also G. Gasbarri, *Riscoprire Bisanzio. Lo studio dell'arte bizantina a Roma e in Italia tra Ottocento e Novecento*, Rome, Viella, 2015.

[28] *Offizieller Bericht über die Verhandlungen des IX Internationalen kunsthistorischen Kongresses in München (16-21 Sept. 1909)*, Leipzig, Seemann, 1911, p. 75; see Meyer, *La Storia dell'arte tra Nationbuilding e Forma*, cit., pp. 239-240.

aristocratique»[29]: in fact, while how to teach history and literature was necessarily inspired by the ideas of an elite, the figurative monuments make it possible «revivre à nos yeux l'homme le plus humble, non seulement dans ses moeurs, mais encore dans ses idees et ses croyances, souvent dédaigneusement passées sous silence par les textes»[30].

The Swiss scholar specified that art history had to become an obligatory and indispensable component of every historical and literary teaching, precisely because art is not a merely individual expression, but a social necessity, as graffiti depicting bison and other animals demonstrate in the prehistoric caves[31]. Naturally, its educational value also derived from this social role of art:

> Voilà le vrai côté éducatif de l'œuvre d'art, entièrement négligé des pédagogues, et trop peuvent aussi des savants eux-mêmes. Voilà qui grandit brusquement le champ de la vision, en mettant l'histoire de l'art en connexion, non plus seulement avec l'esthétique, avec l'histoire politique, mais avec toutes les branches qui s'occupent de l'activité humaine en général, avec la psychologie, la philosophie[32].

In the wake of these considerations, Déonna also attributed a specific importance to the use of figurative documents in teaching and training every historical and literary discipline from a point of view of recovering the traditions and customs of popular classes, also contributing to the strengthening and growth of social cohesion in this way. Not surprisingly, in open controversy with Maurice Barrès's thought, the young Swiss archaeologist insisted on the importance of not considering past and present as two clearly separated worlds, but realities which intimately interpenetrate. Similarly, art history was not only useful to understand the past in a less bookish and pedantic way, that is, it was not only turned backwards, but it also helped to better know the present and to throw light on the experience of the «hommes du XX^{e} siècle», as he pointed out[33].

2. *The professional figure of art historians*

Undoubtedly, the reflection on the kind of students to whom this teaching should be addressed and the one relating to its professionalizing purpose were closely linked to the collocation of art history among university disciplines. As Focillon stated, «L'enseignement de l'histoire de l'art n'est pas simplement le

[29] W. Déonna, *En Suisse*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 104.
[30] *Ibid*., p. 102.
[31] *Ibid*., p. 104.
[32] *Ibid*., p. 105.
[33] *Ibid*., pp. 105-106.

luxe d'une élite, un complement agregable des cours d'histoire et de literature», especially in a modern university, which was «à la fois un organe de culture général, une école spéciale, un institut scientifique où s'élaborent et se précisent des méthodes de recherche»[34].

Thanks to the growing prestige of arthistorical studies in European culture and the role they were playing for the «curiosité intellectuelle de notre temps», university courses were increasingly addressed to a composite and informed audience including a generally educated audience interested in humanities, as well as aspiring high school (especially history) teachers and real specialists, who were preparing to contribute to the progress of this discipline with a new research «par des travaux pratiques e par des enquêtes de détail».

Consequently, courses in history of art at the University of Lyon, like in other French universities, were divided into *cours d'agregation*, *cours de licence* and *cours public*[35]. A distinction of teaching levels included a wide range of nuances from the point of view of the kind of training and professional education that should be provided.

On this regard, the approach of François Benoit, Professor at the University of Lille, was very interesting and, in addition to training high school teachers, he aimed at educating men «au service de l'art», who were able to view and «sentir les nuances de la beautè, à critiquer en se rèferant non à un sentiment personel sujet à erreur, non a cette chose vague qu'on appelle le gout, mais à des lois physiques et à des regles techniques».

In his proposal, university teaching should also have addressed to artists and «chefs d'industrie artistique» but, above all, it should have contributed to train a «sensible, cultivè, averti, exigeant»[36] audience. In fact, the question of a necessary and uneasy distinction between the education of an interested generic public and the professional training of the new generation of art historians repeatedly appears in various contributions of this investigation.

In the German and Austrian university system, the distinction between real general courses, which were accessible to everyone, and seminars, which were addressed to a small group of students and a few external auditors, appeared as a consolidated structure, based on a rather clear distinction between the task of promoting a «general culture» among the ranks of students from all the cultural and scientific fields, according to the humanistic tradition, and the

[34] H. Focillon, *En France. L'Histoire de l'art moderne à Lyon*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 55.

[35] About Focillon, Professor in history of art, see A. Thomine, *L'enseignant. Quelques idées ont autant de facettes que les yeux des papillons*, in Thomine, Briend (edd.), *La vie des formes*, cit., pp. 155-165.

[36] F. Benoit, *En France. L'Institut d'art de l'Université de Lille*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 62.

need to provide art historians with specialized skills and a «culture scientifique necessaire à son métier»[37].

In that same period, a similar approach to higher and university studies was also taking hold with the above-mentioned 1903 Royal Decree on historical-artistic studies in Belgium, where specialist training had been structured into a first three-year general course for students of all the disciplines and a second cycle of studies essentially addressed to a small group of students, real «pupils» who were introduced by professors to scientific work through a series of highly specialized seminar courses[38].

The crucial question of the relationship between university training of specialists and work in museums and Government offices repeatedly peeped during this investigation in a concrete way.

Tietze emphasized that, in order to be hired in museums or to get a job as officials of fine arts in the Habsburg Empire, it was necessary for candidates to have discussed a final scientific thesis, in order to obtain a high academic title[39]. The model of the *Vienna School of Art History* had been always characterized by a strong osmosis between museum and university with professional careers, which almost always included important experiences in both institutions.

The situation in France appeared to be more complex, where a discussion was on the point of choosing whether or not to maintain a distinction between university courses and professional ones at the École du Louvre, specifically addressed to the future staff in museums[40]. Gaston Brière, Professor at the École du Louvre and, at the same time, Keeper at the Palace of Versailles, complained the difficulty of reconciling the objective of the «instruction du public» in higher education with «former des élèves», who are able to work in national and departmental museums, that is to say to promote a wide-ranging «culture artistique» and, at the same time, making those who were called to manage artistic collections acquire a critical method and specific scientific skills[41]. Moreover, a proper education for museum management staff should also have included disciplines, which have not been studied at the university until that time, such as history of collecting and management and administrative know-how, all essential skills to train future keepers.

As it is well known, in Italy the central point of reference for Venturi's project was the *Scuola di Perfezionamento in storia dell'arte medioevale e moderna* [Postgraduate School in History of Medieval and Modern Art], launched in 1896 at the Sapienza University of Rome and essentially addressed to the *post-lauream* training of a class of art historians, who were destined to become public

37 Tietze, *En Autriche*, in *ibid*., p. 76.

38 Fierens-Gevaert, *En Belgique*, in *ibid*., p. 84.

39 Tietze, *En Autriche*, in *ibid*., p. 77.

40 See M. Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-'40)*, Rome, Carocci, 2009, pp. 183-196.

41 G. Brière, *En France. Ècole du Louvre*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 52.

officials and to hold executive and high responsibility positions in Government offices, museums, national galleries and management of monuments[42]. Not surprisingly, this *School* had been designed by Venturi with the aim of selecting future specialists among various students of the Faculty of Arts and Philosophy interested in art history and willing to give their contribution of intelligence for the «renouvellement de la culture artistique nationale»[43]. This *School* had established itself as an institution of excellence and as an indispensable step for future art historians to make a career in museums and Government offices.

Therefore, museums, teaching at school and university career emerge as professional destinations for young students. However, the growing number of university students was about to raise the issue of the difficult absorption of graduated individuals by state institutions. The students' «avenir pratique» risked becoming a real concern according to Hippolyte Fierens-Gevaert, Professor at the University of Liège: a few scholarships or conferences were not enough to survive, because «on en meurt de faim en Belgique»[44]. The students of the art history course should have found a job as teachers in secondary and high schools, librarians in a required specialized library and, finally, guides and didactic operators in museums and public collections. As Fierens-Gevaert pointed out, if it was true that museum management bodies have necessary skills to deal with the setting up of rooms, the purchase of works and the administrative control, it was equally evident the difficulty of getting in touch with the public and getting closer to visitors. Instead, the growing educational role of museum institutions, which was especially verifiable in the increasing number of school trips and the growing importance attributed to it by modern pedagogical and educational reflections, required a scientifically trained staff, who was able to reach all the kinds of visitors and to bring them closer to works of art, their history and their aesthetic significance[45]. This was particularly true for tourists and participants in package tours who thronged the museums where tour guides, «les cornacs des tournées Cook», would have to be replaced with professional guides, licensed by museums. In fact, Fierens-Gevaert pointed out

42 The Postgraduate School in History of Medieval and Modern Art was officially established at the Faculty of Arts in the Sapienza University with the Royal Decree on June 9th, 1901, but it had been preceded by some scholarships intended for the *Specialization in the studies of Medieval and Modern Art* since 1896; see Agosti, *La nascita della storia dell'arte*, cit., pp. 161-180; Mignini, *Diventare storiche dell'arte*, cit., pp. 47-69; S. Ventra, *La Sapienza della tutela. Funzionari docenti nella Scuola di Perfezionamento in Storia dell'arte*, in M. Barrese, R. Gandolfi, M. Onori (edd.), *Storie dell'arte alla Sapienza*, Rome, Edizioni Nuova Cultura, 2017, pp. 159-158; M. Passini, *Adolfo Venturi et la fondation de l'histoire de l'art en Italie au tournant du XIXe siècle*, «Mélanges de l'École française de Rome-Italie et Méditerranée modernes et contemporaines», vol. 130, n. 2, 2018, pp. 311-321.

43 A. Venturi, *En Italie*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 94.

44 Fierens-Gevaert, *En Belgique*, in *ibid*., p. 87.

45 For example, a specific museum pedagogy for schools had been developed by Alfred Lichtwark, who was considered one of the pioneers of museum pedagogy and directed the Hamburger Kunsthalle.

that this system worked in British and American museums, where a didactic activity combined by museum staff with conferences (through slide projections) and guided tours was being experimented: «l'orientation définitive des musées dans une voi de haute culture sociale en même temps que de large diffusion populaire»[46].

3. *Methodological issues and teaching practices*

The real litmus test of all those aspects concerning the role of the institutions and this discipline in the process of the art historian's increasing professionalization – whose profile could no longer coincide with the one of the learned and educated autonomous scholar, but increasingly had to assume the *habitus* of a public official, a teacher or a university researcher – was the reflection on contents and teaching and learning methods. In several points in the contributions of the investigation into question, the challenge of introducing a discipline, which put the material and formal aspects of works of art at the centre of interest among humanities, is still perceptible, contrasting visual knowledge with the authority of the text: «À croire les monuments plutôt que les textes, à ne pas travailler sur photographies, à ne jamais faire de 'litèrature'», this was the imperative to which Benoit inspired his teaching[47]. In fact, if the reasoning on methodological issues was firstly an expression of personal didactic experiences on the one hand, the conception of art history and, consequently, the status of the object of study found a concrete expression here on the other hand.

August Schmarsow's contribution was almost entirely focused on the concrete practice of teaching history of art in German universities, especially in Leipzig: the «general culture» course, addressed to the freshmen of all the faculties still in the orientation phase, could be monographic, dealing with the life and the works of 'great masters' (Titian, Rembrandt, Michelangelo, Raphael, Leonardo, Dürer, Rubens), introducing young students to the heart of an artistic creation from a historical point of view and, at the same time, providing the first concrete examples of visual criticism, reflecting on the distinction between the «authentique» production, i.e. the autograph one, and school works, copies and fakes[48]. A second comparative approach concerned the comparison of the artistic production in different places during a given era,

[46] Fierens-Gevaert, *En Belgique*, in *L'Enseignement de l'Histoire de l'art*, cit., pp. 88-89.

[47] F. Benoit, *En France. L'Institut d'art de l'Université de Lille*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 61.

[48] On the fortune of the biography of the great masters in German artistic historiography between 19th and 20th centuries, see K. Hellwig, *Von der Vita zur Künstlerbiographie*, Berlin, Akademie-Verlag, 2005.

with a particular attention to the North-South dialectic: the Italian Renaissance and the Nordic one, the Baroque in Rome and the one in the countries beyond the Alps, etc. A third type of teaching consisted of an evolutionary history of styles, particularly relevant for medieval art, in order to explain the era when «les peuples occidentaux se séparèrent de la dernière tradition antique»[49].

Schmarsow observed that reconstructing a progressive historical path in planning university courses was less important than identifying what students were able to understand, «satisfaire […] l'interet» of the auditorium and to offer an overview as broad as possible for the chronology and typology of the topics dealt with[50]. Moreover, a teaching approach, which was not based on a rigid propaedeutics among courses, would have favoured a free movement of students among universities, which was one of the cornerstones of higher and university education in Germany[51]. But, above all, it dealt with a conception of art history which concretized its scientific nature in an unlimited extension of objects of study by countries, typologies and periods: «Nous nous occupons aussi bien des cathedrales françaises et des miniatures françaises que de peintures murales en pays rhènans, de constructions scandinaves en bois et de tapisseries anglais du moyen age»[52].

However, Schmarsow explained that the young art historian's introduction to 'scientific' work took place in the seminars, the heart of university teaching: «C'est-à-dire par des cours d'initiation, par des exercises dont la difficulté est graduée selon sa force d'esprit et ses connaissances»[53]. There were «cours pratiques», introduced in history of art following the example of physics and medicine, focused on the discussion of research problems and addressed to a small group of students and a few external auditors. A sort of «gymnastique intellectuelle» modulated on the skills of students/pupils, who were introduced by professors/master to independent scientific research through discussion and joint work, according to the instructions of the most recent pedagogical and didactic innovations. At the University of Leipzig, these seminars, which

[49] A. Schmarsow, *En Allemagne*, in *L'Enseignement de l'Histoire de l'art*, cit., pp. 65-66.

[50] *Ibid.*, p. 66.

[51] Referring to the decades before Hitler's seizing of power, Erwin Panofsky stated: «One basic difference between academic life in the United States and Germany (I wish to limit myself to firsthand experience) is that in Germany the professors are stationary and the students mobile, whereas the opposite is true in the United States […] The German student, however, his abiturium (final diploma of a recognized secondary school) entitling him to enroll at whichever university he pleases, spends one semester here and another there until he has found a teacher under whose direction he wishes to prepare his doctoral thesis (there are no bachelors' and masters' degrees in German universities) and who accepts him, so to speak, as a personal pupil» (E. Panofsky, *Three decades of art history in the United States. Impressions of a transplanted european*, «College art journal», vol. 14, n. 1, 1954, pp. 7-27, transl. *Tre decenni di storia dell'arte negli Stati Uniti. Impressioni di un europeo trapiantato*, in Id., *Il significato nelle arti visive*, Turin, Einaudi, 1962, pp. 303-330).

[52] A. Schmarsow, *En Allemagne*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 66.

[53] *Ibid.*, p. 67.

were diversified according to the educational degree of the students, were composed of a small number of pupils (between 12 and 20), who were selected by professors. Schmarsow argued that a *numerus clausus* regulated access, in order to guarantee its didactic effectiveness, unlike big universities such as Berlin, where the number of attending students could rise up to 50-70 students, making seminars lose their specific nature[54].

The weekly excursions had an important role in university teaching for exercises and discussions in direct contact with works of art and monuments, opportunities for pupils to apply the acquired knowledge alive and, at the same time, life experiences which ended up with a joint dinner or a train ride:

> Une telle communion, avec des surprises ou des incidents attendus, sert à l'éducation de l'homme entier, et non du spécialiste seulement; elle fait le caractère, de même que le football contraint chaque jouer à renoncer à sa volonté exclusive, à remplir, là où il est placé, la stricte fonction dont on l'a chargé, mais d'ailleurs en cet endroit précis à tenir vaillamment son rôle[55].

A strong didactic model which was also shared by the universities of the Habsburg Empire for its organizational aspect (ex-chair courses and «exercices»). However, as Hans Tietze points out, there were some significant differences in the conception of art history, whose mission was «de relire d'une façon génétique les differents phénomènes artistiques du passé, de faire des faits particuliers… une unité maniable par la pensée»[56].

A conception of art history which was different from the main one in German universities for a closer and more vital relationship with contemporary art in the studies of the founding fathers at the Vienna School, such as Franz Wickhoff and Alois Riegl, who had radically reset the arthistorical studies, by directly comparing with the «tout à fait barbares et volontairement primitifs» provocations of contemporary artists and, in particular, with the Viennese Secession research, because «toute intelligence historique vient du sens de la vie et que le passè n'est jamais compris que grâce au present»[57].

[54] *Ibid.*, p. 69. The University of Berlin was certainly one of the most lively and sought-after German universities for History of Art in that historical phase. On this regard, see: H. Bredekamp, A.S. Labuda (edd.), *In der Mitte Berlins. 200 Jahre Kunstgeschichte an der Humboldt-Universität*, Berlin, Mann, 2010.

[55] Schmarsow, *En Allemagne*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 70.

[56] Tietze, *En Autriche*, in *ibid.*, p. 78. In order to examine the methodological dispute between Vienna School and history of art in German universities, see in particular the reflections by A. Schmarsow, *Pro Domo eines Kunsthistorikers*, «Deutsche Literaturzeitung für Kritik der internationalen Wissenschaft», vol. 35, 1914, cc. 965-975 and 1029-1038, devoted to a critical discussion of the text by H. Tietze, *Die Methode der Kunstgeschichte*, Leipzig, 1913.

[57] Tietze, *En Autriche*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 79. On this regard, we can remember Franz Wickhoff's public defence of Gustav Klimt's pictures painted for the University Great Hall, which were harshly criticized by most of the public opinion for the explicit denial of any classicist canon. Cf. C.E. Schorske, *Die Fakultätsbilder von Gustav Klimt und die Krise des liberalen Ich*, in S. Koja (ed.), *Gustav Klimt*, München, Belvedere, 2006, pp. 13-26.

Tietze claimed the close, organic and heuristic relationship between art history and experimentations of contemporary art, aimed at overcoming an academic canon through the use of «primitive» and «barbarian» languages, and a new conception of art history lacking of an idealistic aesthetic canon and, therefore, enabled to understand all the artistic production.

Thus, Tietze was connected to the attempt of the Vienna School to contrast the *national* conception of history of art with a conception which we could define *imperial*, characterized by a cultural approach, which today we would say *inclusive*, and a radical questioning of the link between heritage and national identity emerged in the nineteenth century (such as the late Roman Empire, intensely cultivated by many Habsburg *fin de siècle* scholars)[58]. This effort for a purely scientific knowledge of art required a solid pedagogical basis, guaranteed by a close link with museum practice and protection of monuments. The horizons of research were also broadening with the new generation of Max Dvorak, Julius von Schlosser and, especially, Josef Strzygowski, including Asian art and establishing even more stringent links with other disciplines, in particular ethnography, geography and history of civilization. However, Tietze warned that art history in the future would have to find the right means between erudition and abandonment of scientific precision, in order not to decay into a «pseudo-science» and to lose the «place considerable qu'elle occupe dans les universitès autrichiennes»[59].

Even with any forcing, it seems possible to highlight the distance between similar methodological and didactic approaches, which were rooted in a solid historicist conception, and a teaching still anchored to the visual analysis of the objects, reconnecting to the centuries-old practice of *connoisseurship*. Gaston Brière warned that the common principle of all the teachings at the *Ecole du Louvre* consisted in the method of observing the original objects:

> Étudier autant que possible les originaux eux-mêmes, apprendre à les voir, à en saisir les caractères distinctifs qui permettent de les dater, de les attribuer à un pays, à une école, à un atelier, à un créateur; ou de saisir les falsifications et les restaurations[60].

A similar methodological and didactic approach also characterized Adolfo Venturi's teaching, which focused on visual comparison: «Fair observer, comparer

[58] See M. Mazza, *Spätantike. Genesi e trasformazioni di un tema storiografico (da Burckhardt a Mickwitz e Marrou via Riegl*), in *Atti dei Convegni Lincei (236). Alois Riegel (1858-1905). Un secolo dopo. Convegno internazionale organizzato d'intesa con l'Istituto Archeologico Germanico, l'Istituto Storico Austriaco, la Scuola Normale Superiore di Pisa, l'Istituto Italiano per gli Studi Filosofici (Roma, 30 novembre – 1 e 2 dicembre 2005)*, Rome, Bardi, 2008, pp. 65-115; M. Olin, *Alois Riegl. The Late Roman Empire in the Late Habsburg Empire*, in R. Robertson, E. Timms (edd.), *The Habsburg Legacy. National Identity in Historical Perspective*, Edinburgh, Edinburgh University, 1994, pp. 107-20.

[59] Tietze, *En Autriche*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 81.

[60] Brière, *En France. Ècole du Louvre*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 53.

et voir» was his imperative[61]. For the teaching practice in lecture rooms, this comparative view could be carried out thanks to the use of photographs, even if these should have passed from hand to hand and, therefore, could be no longer seen simultaneously, exceeding a limited number of students who could be gathered around a work table. In order to overcome this difficulty, Venturi had started to reproduce the phototypes of the works discussed during the lectures on large panels to facilitate their comparative sight. Venturi proudly pointed out that a copy of these didactic tables had been requested by several German and Austrian universities, but he had not granted it, because he considered them too closely linked to his teaching[62]. However, even Venturi had been forced to use light projections for lectures in larger groups, to which he recognized the advantage of a greater «vivacitè d'impression», even if these did not allow an immediate comparison among works, but only a view in succession[63].

Focusing on the morphological details of works, Venturi's teaching wanted to 'open' the young pupils' eyes, favouring the desirable separation between the art history and the erudition of historical-literary disciplines at a methodological and didactic level, whose undue overlap had long hindered the disciplinary autonomy of art history to affirm: «Ainsi la fin de nos études n'a pas été clairement comprise de tous ceux qui ont placé les interpretations iconographiques avant la connaissance des formes plastiques»[64].

Iconography, understood as the study of the invention and development of a subject, was recognized as a fundamental part of historical-artistic research, but only on condition that it was subordinated to the study of forms and styles: «Tout, en somme, doit avoir pour but l'éducation de 'connaisseur', si l'on veut développer le gout et le sentiment artistique de la jeunesse»[65].

61 Venturi, *En Italie*, in *ibid.*, p. 95; M. Cardinali, *Adolfo Venturi e la fotografia per "… un metodo più corretto, più fino e più sicuro"*, in *Adolfo Venturi e l'insegnamento della Storia dell'arte*, catalogue of the exhibition (Rome, Sapienza University, 15th December 1992-13th February 1993) edited by S. Valeri, Rome, Lithos, 1992, pp. 83-86; *La documentazione fotografica dell'arte in Italia dagli albori all'epoca moderna*, Naples, ScriptaWeb, 2006, pp. 10-11; H. Dilly, *Weder Grimm, noch Schmarsow, geschweige denn Wölfflin… zur jüngsten Diskussion über die Diaprojektion um 1900*, in C. Caraffa, *Fotografie als Instrument und Medium der Kunstgeschichte*, Berlin, Dt. Kunstverlag, 2008, pp. 91-116; I. Schiaffini, *Adolfo Venturi e la fotografia: ricerca, tutela, didattica*, in *La fototeca di Adolfo Venturi alla Sapienza*, Rome, Campisano Editore, 2018, pp. 17-33.

62 For example, see a letter from Julius von Schlosser dated February 7th, 1900, where he asked his Italian colleague for «a (perhaps a little worn out and stained) copy of the tables destined by you with such a happy idea for teaching History of Art», quoted in D. Levi, *Per la ricostruzione dell'insegnamento storico artistico agli inizi del Novecento: Adolfo Venturi in aula*, in A. Cipriani, V. Curzi, P. Picardi, *Storia dell'arte come impegno civile. Scritti in onore di Marisa Dalai Emiliani*, Rome, Campisano, pp. 407-413, in partic. p. 412.

63 Venturi, *En Italie*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 96.

64 *Ibid*.

65 *Ibid*., p. 97.

In Focillon's teaching practice, it was also important to closely study «les documents figurès» through «le mècanisme delicat des comparisons», taking into account both their aspect of monuments, «depots de pensees et de sentiments», but also their technical and material nature: «Une analyse plus intime est necessaire et, loin de conduire à des généralités arbitraires, elle tend à dégager des vérités limitées, précises et vivantes»[66].

In addition, according to Focillon, the study of the object-document makes up for the young people's intellectualistic tendency and exercised the ability to bring to a synthesis the individual data emerging from the analysis of the objects. An important opportunity to study Italian art in its landscape and *milieu* alive was students and teachers' school trips, preferably during Easter holidays. In order to facilitate and to make these trips to Italy more profitable, in those years the universities of Lyon and Grenoble were promoting the foundation of an art historical Section within the *Institut français* in Florence as an institutional and educational point of reference to visit Italian museums and cities[67].

A few years before, the school trip to Italy had been considered as an integral part of the training course and a central aspect for the foundation of the *Kunsthistorisches Institut*, designed by Schmarsow in the same capital of the Renaissance in 1888, on the occasion of a school trip with his pupils, including the young Aby Warburg[68].

Focillon supported school trips to Italy, which ideally crossed Venturi's school trips with his pupils directed to European museums and galleries to study the Italian artistic heritage abroad, according to an individual didactic plan discussed with the management of the Postgraduate School[69].

The topic of specific equipment for teaching and research within universities assumed increasing importance with the inclusion of the historical-artistic discipline in the university training system. The collections of various reproductions – plaster casts, photographs, slides, etc. – provide the necessary materials for a training focused on images and not just texts. Not surprisingly, Gaston Brière complained about the complete lack of teaching tools at the *Ècole du Louvre*, since the slides used during lectures remained to professors[70]. The French scholar noted that this lack was not entirely counterbalanced even by the significant possibility to teach alive in front of the works from the immense collection in the Louvre. Focillon proudly underlined the richness

66 Focillon, *En France. L'Histoire de l'art moderne à Lyon*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 56.

67 I. Renard, *L'institut français de Florence (1900-1920) – Un épisode des relations franco-italiennes au début du XX^e siècle*, Rome, École française de Rome, 2001.

68 H.W. Hubert, *August Schmarsow, Hermann Grimm und die Gründung des Kunsthistorischen Instituts in Florenz*, in M. Seidel (ed.), *Storia dell'arte e politica culturale intorno al 1900. La fondazione dell'Istituto Germanico di Storia dell'Arte di Firenze*, Venice, Marsilio, 1999, pp. 339-358.

69 Venturi, *En Italie*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 94.

70 Brière, *En France. Ècole du Louvre*, in *ibid.*, p. 54.

of the didactic collections at the University of Lyon, consisting of a cabinet of prints, photographs and slides and an important collection of plaster casts (about 400 units) coming from post-ancient sculpture, which was together with the one devoted to ancient art founded by Henri Lechat in 1898[71].

On this regard, the most avant-gardist project was, however, the workshop set up by François Benoit in the *Institut d'Art* at the University of Lille, founded in 1898 and divided into a library (with an iconotheque), a museum, a technical workshop (with analysis equipment and a high-temperature oven), as well as a photographic workshop. So, a rich work apparatus with collections of photographs and plaster casts (about 60,000 units), slides (about 12,000 units) and «séries techniques» was available to professors and students in order to study materials and artistic techniques.

The heart of the *Institut* was a large working room, equipped with screens for projecting various documents and images at the same time, overhead projectors for drawing and illuminated tables for writing[72]. A state-of-the-art equipment, designed to make it possible to apply a research method and a teaching practice strictly focused on the analysis of the object of art and the study «des phénomenes esthétiques et des conditions physiques, physiologiques, psychologiques des effets des différents arts»[73].

Conclusions

The outbreak of the World War I will shortly dramatically interrupt every kind of dialogue and form of transnational confrontation, such as the one previously started with difficulty, freezing the artistic heritage in its presumed identity function and involving most of the art historians in bitter nationalistic controversies.

Only after the end of the world war, they will try to tie the broken threads again in a deeply changed cultural context. In the mid-twenties, the *Office International des Instituts d'Art et d'Archéologie*, founded thanks Henri Focillon's initiative within the *Institut International de Coopération Intellectuelle*, a body of the

71 Ch. Briend, *Le conservateur*, in Thomine, Briend (edd.), *La vie des formes*, cit., pp. 99-109, in partic. p. 107.

72 «Une salle de travail dont l'agencement perfectionné permet, en un même moment, de projecter sur l'écran un ou plusieurs documents, de dessiner sur des tableaux illuminés et d'écrire sur des tables éclairées» (Benoit, *En France. L'Institut d'art de l'Université de Lille*, in *L'Enseignement de l'Histoire de l'art*, cit., pp. 60-61). See: J.-F. Condette, *Les Lettrés de la République. Les enseignants de la faculté des Lettres de Douai puis Lille sous la Troisième République (1870-1940)*, Villeneuve-d'Ascq, Université Charles-de-Gaulle Lille 3, IRHiS-Institut de recherches historiques du Septentrion, 2006, p. 75.

73 Benoit, *En France. L'Institut d'art de l'Université de Lille*, in *L'Enseignement de l'Histoire de l'art*, cit., p. 61.

League of Nations, will launch a greater new «enquête sur l'enseignement de l'histoire de l'art», aimed at drawing up an exhaustive map for teaching artistic disciplines in various countries belonging to the League of Nations[74].

[74] A. Ducci, *Il «Bulletin de l'Office International des Instituts d'Archéologie et d'Histoire de l'Art» e il dibattito per una moderna storia dell'arte alla Società delle Nazioni*, «Memfonte», vol. 13, 2014, pp. 156-174.

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Mons. Giovanni Battista Scalabrini and italian emigration in Brazil: pastoral care, education and national identity (1888-1905)

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ABSTRACT: The article, which uses a very rich unpublished and printed documentation, reconstructs the educational and pastoral experience of Monsignor Giovanni Battista Scalabrini with particular reference to the role played by the priest in the Italian emigration in Brazil.

EET/TEE KEYWORDS: History of education; Italian emigration; Pastoral care; National identity; Brazil; XIXth-XXth Centuries.

Introduction

At the beginning of the nineties, in attempting a first organic reading of the role exercised by the Italian Church in addressing the striking level of mass emigration from the peninsula from the second half of the 19th century, the emigration historian Gianfausto Rosoli commented that the history of «a new type of religious institutes, that is, of 'active life', with a predominantly missionary orientation», was still «an almost unexplored chapter in the history of the contemporary Church», and the «relationship between missionary expansion and assistance to emigrants» was «even less explored»[1].

This genuine historiographical gap pointed out by the Rosoli undoubtedly seemed surprising both due to the progress made in Italy, in previous decades,

[1] G. Rosoli, *Ordini e congregazioni religiose per l'emigrazione italiana*, in *L'emigrazione italiana 1870-1970. Atti dei colloqui di Roma 19-20 settembre 1989; 29-31 ottobre 1990; 28-30 ottobre 1991; 28-30 ottobre 1993*, 2 vols., Roma, Ministero per i beni e le attività culturali – Direzione generale per gli archivi, 2002, Vol. II, pp. 1347-1348.

by the copious documented research into the renewal of male and female religious life at the turn of the twentieth century; and, in particular, for the real centrality occupied by emigration in European and non-European history of the same period[2].

In fact, studies from this same period on the nineteenth and twentieth centuries have shown a surprising flowering of new (especially female) religious institutes. The data available to us attest, in this regard, to the extraordinary extent of the phenomenon: compared to the approximately 43 male and female religious institutes which, overall, were established in the previous three centuries (16th to 18th), between 1801 and 1973 more than 400 new women's religious institutes and just under a hundred men's institutes appeared in Italy[3].

Most of these new religious institutes elected as privileged – and sometimes exclusive – areas of their apostolate, alongside missionary commitment (and later, as we shall see, the religious care of migrants), helping the sick and poor and disinherited youth, the recovery of minors who were morally *endangered* and most at risk, the care of orphans and abandoned children, catechesis and Christian outreach work with youth in parishes and, above all, the civil and religious instruction and education of the boys and girls across all social classes, for which they established day schools, convent schools and boarding schools, vocational training courses and training in crafts and agricultural work[4].

[2] Studies and research on Italian emigration abroad have seen significant development in recent decades. For an overview, see: E. Franzina, *Emigrazione transoceanica e ricerca storica in Italia: gli ultimi dieci anni (1978-1988)*, «Altreitalie. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. I, n. 1, 1989, pp. 6-57; M. Sanfilippo, *Problemi di storiografia dell'emigrazione italiana*, Viterbo, Sette Città, 2002; e Id., *Emigrazione italiana: il dibattito storiografico nel nuovo millennio*, «Studi Emigrazione», vol. XL, n. 150, 2003, pp. 376-396. An interesting epistemological and cultural discussion is provided in the recent speech by M. Colucci, *Storia o memoria? L'emigrazione italiana tra ricerca storica, uso pubblico e valorizzazione culturale*, «Studi Emigrazione», vol. XLIV, n. 167, 2007, pp. 721-728. More recent works include: P. Corti, *Emigranti, esuli, profughi. Origini e sviluppi dei movimenti migratori nel Novecento*, Torino, Paravia-Bruno Mondadori, 2001; P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. I. Partenze*, Roma, Donzelli Editore, 2001; P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. II. Arrivi*, Roma, Donzelli Editore, 2002; M. Sanfilippo (ed.), *Emigrazione e storia d'Italia*, Cosenza, Pellegrini, 2003; L. Incisa di Camerana, *Il grande esodo. Storia delle migrazioni italiane nel mondo*, Milano, Corbaccio 2003; M. Colucci, S. Gallo, *L'emigrazione italiana. Storia e documenti*, Brescia, Morcelliana, 2015; M. Sanfilippo, M. Colucci, *Guida allo studio dell'emigrazione italiana*, Viterbo, Sette Città, 2010.

[3] See G. Rocca, *Donne religiose. Contributo ad una storia della condizione femminile in Italia nel sec. XIX e XX*, Roma, Paoline, 1993. On the Italian and European aspects of this phenomenon, see: Langlois, *Le catholicisme au féminin. Les congrégations françaises à supérieure générale au XIX siècle*, cit.; P. Wjnants, *Religieuses 1801-1975, t. I: Belgique-Luxembourg*, Namur, Maastricht/Vaals, 1981; A.J. Alkemande, *Vrouwen XIX, Geschiedenis van negentien religieuze congregaties, 1800-1850*, Utrech, 1966; V. Faubell, *Las Ordenes y Congregaciones religiosas y la educación en la España contemporánea*, in J.M. Prellezo (ed.), *L'impegno dell'educare. Studi in onore di Pietro Braido*, Roma, Las, 1991, pp. 113-184.

[4] See R. Sani, *«Ad Maiorem Dei Gloriam». Istituti religiosi, educazione e scuola nell'Italia moderna e contemporanea*, Macerata, eum, 2009.

At the origin of this extraordinary flowering of new religious foundations of active and charitable life, starting from the Age of the Restoration (1815), the Church undoubtedly faced the new challenges posed by a society undergoing rapid and profound change, in which the needs of the Christian reconquest, after the divisions and upheavals caused by the French Revolution and the Napoleonic legislation, were joined to the secularization of the mentality and customs brought about in Italy and in the rest of Europe by the socioeconomic and cultural transformations characteristic of the bourgeois age[5].

It is, therefore, not surprising that a sort of primacy of religious education and pastoral care (*cura animarum*) emerged in the post-revolutionary Church, which drew sustenance from the increased awareness of the limited efficacy of traditional catechesis, which focused largely on the mechanical transmission of the principles of the faith (the catechism): the Tridentine-style catechesis, characteristic of the sixteenth to eighteenth centuries, effectively responded to the demands of a society that was still firmly Christian, although now rigidly separated on a confessional basis (Catholic, Lutheran, Calvinist etc.), but which appeared to enfeebled in its response to the attitude of indifference to religion and sense of its irrelevance that was to characterize the nineteenth and twentieth centuries[6].

At the same time, in the face of the major political, economic and social upheavals, there was a growing perception that assistance understood as mere almsgiving, as episodic charitable giving, as an occasional intervention with the aim of alleviating the hunger and material suffering of the poor, was no longer sufficient. The twofold need to meet the needs of the poor and suffering and to reconquer for Christ a society that seemed by now to have lost any authentic reference to faith and Christian principles resulted in an awareness of an entirely focus for charity[7].

The new religious foundations that were established in the first decades of the nineteenth century were, in this regard, the sponsors of a strong charity demand: a charity, however, as has been mentioned, understood «not only as assistance (for example, hospital), but also (and above all) as education, in the awareness that education itself is a pre-eminent form of charity»[8].

From this point of view, schools were conceived by them as the most effective tools for the Christian education of the new generations and this education, in

[5] See R. Sani, *Spiritualità e ideali di vita religiosa in Francia e in Italia tra Rivoluzione e Restaurazione*, «Annali della Facoltà di Scienze della Formazione dell'Università degli Studi di Macerata», vol. I, n. 1, 2004, pp. 337-355.

[6] See Id. (ed.), *Chiesa, educazione e società nella Lombardia del primo Ottocento. Gli Istituti religiosi tra impegno educativo e nuove forme di apostolato*, Milano, Centro Ambrosiano, 1996.

[7] See Id., *Istruzione, educazione e carità*, in L. Vaccaro (ed.), *Storia religiosa dell'Italia*, 2 vols., Milano, Centro Ambrosiano, 2016, Vol. II, pp. 517-539.

[8] See M. Marcocchi, *Indirizzi di spiritualità ed esigenze educative nella società post-rivoluzionaria dell'Italia settentrionale*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola, 1994, p. 83.

turn, was considered the most suitable way to reform society, to renew customs, to rebuild the Christian social and civil fabric that the onset of Enlightenment rationalism followed by the revolutionary and Napoleonic events had rent destroyed.

1. *The Church and religious assistance to Italian emigrants on the American continent. The difficult beginnings: from the first decades of the nineteenth century to the mid-1880s*

It is in this scenario, as is well known, that from the 1830s and throughout the nineteenth century, that the migration process took shape and was destined soon to become a mass phenomenon[9] and to arouse, in Italy as in other countries of the Old Continent, the interest and ever-growing concern of the Catholic Church due to the serious threat posed by mass migration to the faith and religious identity of populations.

> Gianfausto Rosoli notes that the figures show that about 60 million Europeans who travelled across the Atlantic, especially to America and Oceania, between 1830 and 1930. Not all Catholic countries were equally affected and not all groups experienced the same problems from a religious point of view, at least not at the same level. Ireland, Germany, Italy and Poland were among the nations with highest migration. […] The greatest difficulties for religious assistance seem to have existed precisely for those groups who, like the Italians, were experiencing a particularly difficult time in institutional, social and religious life. […] The question that arose, in essence, was the very survival of faith in masses that could no longer be controlled and which, it was feared, would fall prey to irreligion and collective apostasy, as it began to be expressed even in the official language of the Church[10].

Unlike other European countries characterized by high migratory levels, such as Ireland, Germany, Spain and Poland, which from the beginning ensured the presence alongside migrant believers of a secular and regular clergy, numerically sufficient and adequately trained from a religious and pastoral point of view[11], the destination countries of Italian migration initially enjoyed the spiritual

[9] See J.D. Gould, *European Inter-continental Emigration, 1815-1914: Patterns and Causes*, «The Journal of European Economic History», vol. VIII, n. 3, 1979, pp. 593-679; Id., *European Inter-continental Emigration. The Road Home: Return Migration from the USA*, «The Journal of European Economic History», vol. IX, n. 1, 1980, pp. 41-112; G. Rosoli, *Un quadro globale della diaspora italiana nelle Americhe*, «Altreitalie. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. IV, n. 8, 1992, pp. 8-24.

[10] Rosoli, *Ordini e congregazioni religiose per l'emigrazione italiana*, cit., pp. 1348-1349.

[11] See R. Azzi, *A Igreja e os Migrantes. I: A migração italiana e os primórdios da obra escalabriniana no Brasil (1884-1904)*, São Paulo, Edições Paulinas, 1987, pp. 74-75.

assistance of a decidedly limited number of priests and clerics who were poorly prepared to face the new challenges posed by the phenomenon of migration[12].

Confusion, improvisation, disorganization, poor planning and a lack of specific pastoral skills were the characteristic features of the religious support provided to Italian emigrants in this first phase by a number of secular priests already in the destination countries, some of whom had a turbulent past at home and lacked ecclesiastical discipline[13]. In this regard, the retrospective reflections of the Scalabrinian priest Pietro Maldotti, in a report sent in 1898 to Msgr. Giovanni Battista Scalabrini, are of note:

> And we – he wrote – whom the secular priests have sent as gifts to our settlers? […] Two thirds of our priests in Brazil are a real scourge of that poor church and of its souls. After escaping from their dioceses, after having crucified their Bishops, full of vices and crimes, have found a land of plenty there, a vast field to be plundered and exploited. Their daring and the immense distances covered by the local Bishops left them virtually unpunished and unpunishable. Truly a flock of birds of prey[14].

This explains why, both in Europe, and in particular in the American continent and in other overseas territories, the Sacred Congregation for the Propagation of the Faith from the 1840s repeatedly asked certain long-established missionary religious institutes already active in the area to support and integrate the work of the secular clergy and to assign some members of Italian origin to the assistance and pastoral care of their immigrant compatriots[15]. This was the case, for example, of the Friars Minor Capuchin, the Lazarists, the Passionists, the Jesuits, the Conventual Franciscans and the Servants of Mary, to mention only those most involved, which were soon joined by some monastic communities of Benedictines and Camaldolese[16].

12 Cfr. G. Rosoli, *I movimenti di migrazione e i cattolici*, in E. Guerriero, A. Zambarbieri (edd.), *Storia della Chiesa. XXXII/1. La Chiesa e la società industriale (1878-1922)*, Milano, Paoline, 1990, pp. 497-526; e Id., *Movimenti migratori e nuove forme di carità e di assistenza*, in M. Guasco, E. Guerriero, F. Traniello (edd.), *Storia della Chiesa. XXXIII. I cattolici nel mondo contemporaneo (1922-1958)*, Milano, Paoline, 1990, pp. 454-471.

13 With specific reference to southern Brazil, see the important study by A. Rubert, *Clero secular italiano no Rio Grande do Sul: 1815-1930*, Santa Maria, Ed. Pallotti, 1977.

14 P. Maldotti, *Relazione sull'operato della missione del porto di Genova dal 1894 al 1898 e sui due viaggi al Brasile*, Genova, Tipografia della Gioventù, 1898; now republished in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, «Studi Emigrazione», vol. V, n. 11-12, 1968, pp. 419-480 (the quotation in the text is from p. 445).

15 See S.M. Di Giovanni, *The Propaganda Fide and the «Italian problem»*, in G. Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, Roma, Centro Studi Emigrazione, 1989, pp. 443-452.

16 Among the limited number of studies on pastoral activity and religious assistance provided to Italian immigrants by long-established missionary, see in particular: Metodio da Nembro, *Storia dell'attività missionaria dei Minori Cappuccini nel Brasile (1538?-1889)*, Roma, Istituto Storico dei Frati Minori Cappuccini, 1958; J.O. Beozzo, *O clero italiano no Brasil*, in L.A. De Boni (ed.), *A presença italiana no Brasil*, Porto Alegre, EST, 1987, pp. 34-62; R. Costa, *Il contributo del clero*

The contribution of the long-established missionary institutes and the monastic communities to the religious assistance of Italian immigrants was very significant from a quantitative point of view[17], especially in the American continent, even if their pastoral commitment, of a very traditional and poorly specialized nature, contributed only partially to improving the situation[18].

In fact, the pastoral activity and religious assistance of Italian priests and clerics towards their immigrant countrymen was undoubtedly made decidedly very difficult and, at times, almost impossible, especially on the American continent, by the difficulties related to the lack of connections and the wide dispersion of emigrants in immense territories and, particularly in large cities, the lack of collaboration between the indigenous clergy and the Italian missionaries and the genuine obstacles sometimes raised, for a range of reasons, by local churches.

The situation in this area was particularly serious in Brazil, where, again in the 1880s and 1890s, the religious assistance and pastoral care provided for Italian immigrant populations suffered from major gaps. In this regard, in his above-mentioned *Report on the work of the mission of the port of Genoa from 1894 to 1898 and on the two voyages to Brazil* (1898), the father Pietro Maldotti complained that:

> Ecclesiastically Brazil is divided into *seventeen* Dioceses, two of which, Amazonas and Parà, have a surface area of almost 3,000,000 km^2. […] Too few shepherds for a flock of 18 million souls dispersed throughout a huge territory, with an almost absolute lack of means of communication. […] There are very few indigenous Clergy. I encountered dioceses of a million km in surface area with about fifteen priests, including some missionaries[19].

But it was not just a question of immense distances, lack of connections and the severe lack of indigenous clergy devoted to the *cura animarum*. On this matter, in a report sent to the Sacred Congregation for the Propagation of the Faith on 4 September, 1889, Msgr. Giovanni Battista Scalabrini offered a much richer and more articulated picture of the reasons that had hitherto prevented the implementation of a solid and functional work of religious assistance and spiritual care for Italians who emigrated to Brazil:

italiano alla colonizzazione rio-grandense, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 411-429.

17 See R. Gonzáles, *Iglesia e inmigración en la Argentina, 1810-1914*, in *La immigración en la Argentina*, Tucumán, Universidad Nacional de Tucumán, 1979; and above all the numerous references in W. Henkel, *La Chiesa in America Latina*, in J. Metzler (ed.), *Storia della Chiesa. Vol. XXIV. Dalle missioni alle chiese locali (1846-1965)*, Milano, Paoline, 1990.

18 See J.O. Beozzo, *O clero italiano no Brasil*, in L.A. De Boni (ed.), *A presença italiana no Brasil*, Porto Alegre, EST, 1987, pp. 34-62; J. Hennesey, *Italian immigration and the Church in the United States*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 431-442.

19 Maldotti, *Relazione sull'operato della missione del porto di Genova dal 1894 al 1898 e sui due viaggi al Brasile*, cit., p. 433.

Your Most Reverend Eminence – wrote the bishop of Piacenza to Cardinal Giovanni Simeoni, the prefect of the Sacred Congregation for the Propagation of the Faith – in homage to the desire expressed by Your Eminence, I hereby present you with a more detailed report of the sad conditions in which our Missionaries and compatriots find themselves in Brazil. Italian immigration in Brazil, which according to the most recent calculations, has reached approximately 350 thousand and is distributed in the territories of the various provinces of the empire, that is to say over a landmass as vast as Europe, of immense distances, where rivers, virgin forests and the depopulated plains often pose insurmountable difficulties and are always difficult to overcome.

He added:

Now, given such a state of affairs, the missionary's work, which is already difficult and tiring in itself, becomes quite impossible and unsuccessful if he does not have full freedom of action, where he cannot freely act as a parish priest to our compatriots whenever they ask for him and wherever they are. […] But, alas! The poor Missionary does not have the faculties for that parish; the parish priest did not want to grant them that faculty, because in two or three years, when they become comfortable or the settlers seem sufficiently at ease, he will move among them, not to reap the holy harvest of souls, but to make a vile market of the things of God. […] It is necessary to repair this situation quickly, because such shame not only renders religion hateful and provides a pretext for unscrupulous or malicious spirits to fight and deride it, but it also spreads doubt and disbelief in those poor simple souls of the settlers[20].

Msgr. Scalabrini was referring, of course, to the obstructionism of local parish priests, who did not intend to miss out on any 'stole fees' (for weddings, baptisms, funerals) to which there were entitled and, therefore, while not taking on the pastoral care of the communities of Italian immigrants in the territory of the parish, they did not grant the authorization to perform this work of religious assistance to the Italian priests and missionaries in their parochial jurisdiction. This question added to the difficulties encountered in rural areas, and especially in the coffee plantations belonging to the large landowners with regard to any form of assistance to the Italian workers by the missionaries:

As has been correctly emphasized, the Italian colony of Sao Paulo (the largest in Brazil, with an estimated half a million Italians, approximately, at the beginning of the century) posed significant pastoral problems, especially for the Italians scattered within the state, who were the most abandoned. […] In fact, while many emigrants stopped in the city, most of them initially went to the approximately 2,500 *fazendas* scattered in the interior with the aim of accumulating savings quickly. The emigrants on the *fazendas* worked in extremely harsh conditions, as wage labourers, usually on a piecework basis, employed by largely despotic and exploitative fazendeiros, with negative moral and religious consequences.

[20] *Relazione di G.B. Scalabrini a Propaganda Fide (card. Giovanni Simeoni) sullo stato della Congregazione*, Piacenza 4 settembre 1889, in Archivio Generale Scalabriniano presso Istituto Storico G.B. Scalabrini – Roma (hereafter: AGS), BA 02-01-01a; now edited in G. Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, Napoli, Autorinediti, 2014, pp. 216-218 (the quoted section is on p. 217).

Religious practice itself was often hindered, while missionary visits required the landowner's authorization[21].

2. *The Church and Italian emigration in America: the role of the new religious foundations at the turn of the nineteenth century*

Studies on Italian emigration to the American continent document the increasing presence, from the 1880s, of the newly founded men's and women's religious institutes. Mary Ewens, for example, found that 91 of the 119 religious congregations active in the United States in the 19th century were of European origin[22]. According to Rubén Gonzáles, 28 men's and 38 women's religious institutes of European origin were established in Argentina between 1854 and 1914, among which foundations of Italian origin stand out[23]. Finally, Werner Henkel recalled that, at the beginning of the twentieth century, only 5 women's religious congregations with 2,462 nuns were present in Brazil; over the next seventy years their number increased to 325, with 41,309 nuns[24].

The presence and commitment of the new religious foundations stemmed largely from unpredictability, from ad hoc reasons and not from a pre-determined plan: the service to Italian emigrants on the American continent, in fact, was not a result of the original allure of these institutes. In many cases, in fact, this was an experience destined to run its course over a few years, or, at most, a few decades. And, yet, it was a presence and a commitment destined to fill a void, to significantly impact on the religious growth of individuals and Italian communities abroad.

For example, without any claims to completeness, among the new men's and women's religious institutes most involved, especially during the second half of the 19th century, in the religious assistance and pastoral care of the Italian populations who emigrated to America the following should be noted: the Marists of Marcellino Champagnat (Lyon 1816), the Pallottines (Society of the Catholic Apostolate) founded by Don Vincenzo Pallotti (Rome 1839),

21 G. Rosoli, *Chiesa ed emigrati italiani in Brasile: 1880-1940*, in *Chiesa ed emigrazione italiana tra '800 e '900*, «Studi Emigrazione», vol. XIX, n. 66, 1982, pp. 228-229. See also G. Rosoli, *Le organizzazioni cattoliche e gli emigrati italiani in Brasile*, in R. De Felice (ed.), *L'emigrazione italiana in Brasile 1800-1978*, Torino, Fondazione G. Agnelli, 1980, pp. 191-233.

22 M. Ewens, *The leadership of nuns in immigrant Catholicism*, in R.R. Ruether, R.S. Keller (edd.), *Women and religion in America, I: The Nineteenth Century*, San Francisco, Harper & Row, 1981, p. 103.

23 R. Gonzáles, *Iglesia e inmigración en la Argentina, 1810-1914*, in *La immigración en la Argentina*, Tucumán, Universidad Nacional de Tucumán, 1979, pp. 89-121.

24 W. Henkel, *La Chiesa in America Latina*, in J. Metzler (ed.), *Storia della Chiesa. Vol. XXIV. Dalle missioni alle chiese locali (1846-1965)*, Milano, Paoline, 1990, p. 630.

the Salesians (Salesian Society) of Don John Bosco (Turin 1859); and also: the Josephites (Congregation of Saint Joseph) of Don Leonardo Murialdo (Turin 1873), the Dehonians (Priests of the Sacred Heart of Jesus) of father Léon Gustave Dehon (Soissons 1877) and, finally, the Sons of Divine Providence (Small Work of Divine Providence) founded by Don Luigi Orione (Tortona 1903)[25].

The women's foundations were even better represented, with the following of note: the Sisters of Charity of the Immaculate Conception of Ivrea of Antonia Maria Verna (Rivarolo Canavese 1806), the Sisters of St. Joseph of Chambéry of Jean Marcoux (Chambéry 1817), the Daughters of Our Lady of the Garden established by Msgr. Antonio Maria Gianelli (Chiavari 1829), the Josephine Sisters (Sisters of Saint Joseph of Cuneo) founded by Don Bartolomeo Manassero (Cuneo 1831), the Sisters of Saint Dorothy of Paola Frassinetti (Genoa 1836), the Daughters of Our Lady of Mercy of Maria Rossello (Albissola 1837), the Sisters of Mercy established by Don Carlo Steeb (Verona 1840); and also: the Daughters of Saint Anne founded by Rosa Gattorno (Piacenza 1865), the Daughters of Mary Help of Christians established by Don John Bosco and Maria Domenica Mazzarello (Turin 1872), the Capuchin Sisters of Francesca Maria Rubatto (Loano 1885), Oblate Sisters of the Sacred Heart founded by Teresa Casini (Rome 1881), the Minim Sisters of the Sacred Heart of Maria Margherita Caiani (Poggio a Caiano 1896), and the Little Missionary Sisters of Charity (Little Work of Divine Providence) founded by Don Luigi Orione (Tortona 1915).

The presence of the new men's and women's religious institutes that arose during the nineteenth century was massive and there was an extraordinary commitment, in terms of support for religious life and pastoral care and in terms of assistance and education for the benefit of the communities of Italian immigrants to the American continent. A presence and a commitment – it should be noted – that has received scant attention from a historical perspective.

But alongside the above-mentioned institutions, there were also religious foundations directly linked to the migratory experience. In the case of Brazil, for example, the activity of the Little Sisters of the Immaculate Conception, the

[25] Among the limited studies dedicated to the work of these men's religious foundations in the area of religious assistance and pastoral care of Italians who emigrated overseas, we should mention: G.M. Balen, *Opera di sacerdoti e congregazioni italiane nel progresso religioso, nello sviluppo dell'arte, dell'istruzione e dell'assistenza nello Stato*, in *La cooperazione degli italiani al progresso civile ed economico del Rio Grande do Sul*, Porto Alegre, Globo, 1925, pp. 151-192; F. Amoroso, *S. Vincenzo Pallotti romano*, Roma, Società Apostolato Cattolico, 1962; E. Scarzanella, *Italiani d'Argentina. Storie di contadini, industriali e missionari italiani in Argentina, 1850-1912*, Venezia, Marsilio, 1983; G. Rosoli, *Impegno missionario e assistenza religiosa agli emigranti nella visione e nell'opera di don Bosco e dei Salesiani*, in F. Traniello (ed.), *Don Bosco nella storia della cultura popolare*, Torino, SEI, 1987, pp. 289-329; F. Motto, *Vita e azione della parrocchia nazionale salesiana dei Santi Pietro e Paolo a San Francisco (1897-1930). Da colonia di paesani a comunità di italiani*, Roma, LAS, 2010.

women's institute founded in Nova Trento (Santa Catarina) in 1890 by Paulina do Coração Agonizante de Jesus, born Amabile Lucia Wisintainer, a native of Trento who migrated to Brazil with her villagers in the years of the great emigration (1875)[26]. In Argentina, the most significant are the Sisters of Saint Anthony of Padua, the women's institute founded in Buenos Aires in 1889 by the Italian Antonia Luisa Cerini, who emigrated from her native Castellanza to America in 1839, and the Franciscan Missionaries and Catechist Missionaries of Christ the King, established respectively in 1878 and 1895, the former by the Franciscan friar Quirico Porreca and the latter by the Dominican monk Davide Ghiringhelli[27].

The most significant experiences in this area, however, were undoubtedly those relating to men's and women's specialized religious institutes, i.e. those that from their foundation had the pastoral care of Italian emigrants abroad as a unique and exclusive objective of their apostolate, as a specific charisma.

This is the case, first, of the Missionaries of Saint Charles Borromeo for the emigrants, better known as the Scalabrinians, established in Piacenza in 1887 by Msgr. Giovanni Battista Scalabrini[28], to whom we will return at greater length shortly, by virtue of their specific and genuine centrality in the assistance and religious care for Italian migrants; the Missionary Sisters of the Sacred Heart of Jesus, founded in Codogno in 1880 by mother Francesca Saverio Cabrini, which, from 1889, was the first women's religious institute to look after Italian emigrants on the American continent[29]; the Apostolic Sisters of the Sacred Heart of Jesus, established in Viareggio in 1894 by mother Clelia Merloni[30]; and, finally, the Missionary Sisters of Saint Charles Borromeo for emigrants (originally known as the *Servants of orphans and derelicts abroad*),

[26] See G. Lorenzi, La *Beata Madre Paolina fra carisma e obbedienza*, Milano, Àncora, 1991.

[27] See Gonzáles, *Iglesia e inmigración en la Argentina, 1810-1914*, in *La immigración en la Argentina*, cit., pp. 114-116.

[28] See M. Francesconi, *Storia della Congregazione Scalabriniana*, 6 vols., Roma, Centro Studi Emigrazione, 1969-1982; A. Perotti, *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, numero speciale di «Studi Emigrazione», vol. V, nn. 11-12, 1968, pp. 1-198; C. Bellò, *Scalabrini, Bonomelli e l'emigrazione italiana*, «Studi Emigrazione», vol. XII, 1975, pp. 3-46; Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit.; G. Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, Napoli, Autorinediti, 2014.

[29] See N. Vian, *Madre Cabrini*, Brescia, Morcelliana, 1938; G. Dall'Ongaro, *Francesca Cabrini. La Santa che conquistò l'America*, Milano, Rusconi, 1982; M.L. Sullivan, *Scalabrini and Mother Cabrini*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 371-388; Ead., *Madre Cabrini e le sue missionarie negli Stati Uniti: fonti esistenti presso il Cabrini College di Radnor, Pennsylvania*, in *L'emigrazione italiana 1870-1970. Atti dei colloqui di Roma 19-20 settembre 1989; 29-31 ottobre 1990; 28-30 ottobre 1991; 28-30 ottobre 1993*, cit., Vol. II, pp. 1170-1190.

[30] See *Una vita e un'opera. Nel centenario della nascita di madre Clelia Merloni, fondatrice della congregazione delle Suore Missionarie Zelatrici del S. Cuore di Gesù (1861-1961)*, Roma, Edizioni Casa Generalizia, 1961.

better known as the Scalabrinian Sisters, founded in 1895 in Piacenza by the same Msgr. Giovanni Battista Scalabrini[31]:

It is precisely the birth and development of so many religious institutes operating in the field of social works and charity – stated Gianfausto Rosoli – through both traditional and more modern forms of assistance, that represents one of the signs of the vitality of the Church from Pius IX onwards. […] Religious assistance to compatriots was one of the priority channels for the spread of the new religious institutes abroad, not only to respond to urgent and unmet needs, but also for reasons of solidarity with «those nearest and dearest»[32].

3. *Msgr. Giovanni Battista Scalabrini and the two branches, male and female, of the Scalabrinian Congregation*

At the origin of the foundation of the Institute of the Missionaries of St. Charles Borromeo for emigrants (1887) lies the awareness of the bishop of Piacenza, Msgr. Giovanni Battista Scalabrini, that migration abroad was not episodic, but structural and destined to be a mass phenomenon that provided an essential 'relief valve' for an economically backward country without a modern productive structure.

Emigration – he wrote in 1887 – is a natural, providential reality. It is a safety valve given by God to this suffering society. […] Emigration in almost all cases is not a pleasure, but an inevitable necessity. Without doubt, among the emigrants there are also bad individuals, vagrants and depraved people: but these are the minority. The vast majority, if not all those who leave their native country to travel to far-off America, are not of this temperament; they are not fleeing Italy because they abhor work, but because they lack work and have no way of living and supporting their family[33].

The Lombard prelate was also convinced that the new unitary state established in 1861 was not really able to guarantee assistance and protection to Italians who emigrated abroad, due to the serious gaps in the legislation on the matter, the deficient and incompetent network of Italian consulates present and operating in immigration countries and, finally, due to the poor and superficial attention shown by the liberal ruling class and public opinion towards the problem. Hence the firm conviction of the Lombard prelate that it was the task

31 See L.M. Signor, *Il progetto pastorale di Scalabrini e la fondazione delle Suore Missionarie Scalabriniane*, in Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 349-370.

32 Id., *Ordini e congregazioni religiose per l'emigrazione italiana*, cit., pp. 1349-1351.

33 *L'emigrazione italiana in America. Osservazioni di Giovanni Battista Scalabrini, Vescovo di Piacenza*, Piacenza, Tipografia dell'Amico del Popolo, 1887; republished in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, cit., pp. 201-230 (from which we quote), p. 203.

of the Church to make up for the shortcomings of public intervention and to care for the material and spiritual needs of the Italians who emigrated abroad.

But in healing the wounds afflicting Italian emigration – said Msgr. Scalabrini – laws, Gentlemen, do not suffice, because some of these wounds are inherent to emigration, others are the result of remote causes that are beyond the control of laws – even with the best laws in the world and the most numerous and perfect law enforcers, those evils would not be eradicated. […] It is here, Gentlemen, that the work of the ruling classes must begin, where the work of laws and the government ends[34].

For the bishop of Piacenza, on the other hand, mass emigration was not only a dramatic social and economic challenge for the new unitary state, but also, and above all, a religious challenge, a very serious threat to the Christian faith of the population and to the future of the Catholic religion. In this regard, in submitting the project of his men's religious institute to the Sacred Congregation for the Propagation of the Faith, on 16 February, 1887, Msgr. Scalabrini stressed that:

It is necessary to provide for the spiritual needs of many hundreds of thousands of our compatriots, and it is urgent to provide for them as soon as possible. If it is postponed any longer, the damage will be irreparable. Unbelief, heresy and above all Freemasonry, which is very powerful in America, actively work to capture the hearts and minds of the emigrants[35].

And again, elsewhere:

But what is most distressing in all this is the thought that most of the religious, moral and economic evils to which our emigration is exposed could be avoided or become very small if the ruling classes in Italy were aware of the duties that bind them to their expatriate brothers[36].

For the Lombard prelate, there was a very close link between the national and community identity and the religious belonging of the populations, especially the poorest and most neglected (peasants and workers)[37]. From this point of

[34] G.B. Scalabrini, *L'emigrazione degli operai italiani*, in Opera dei Congressi e dei Comitati Cattolici in Italia, *Atti e Documenti del XVI Congresso Cattolico Italiano tenutosi in Ferrara nei giorni 18-21 aprile 1899*, Venezia, Tip. Patriarcale già Cordella, 1899; again edited in *La società italiana di fronte alle prime migrazioni di massa. Il contributo di Mons. Scalabrini e dei suoi primi collaboratori alla tutela degli emigranti*, cit., p. 300.

[35] *Progetto di un'Associazione allo scopo di provvedere ai bisogni spirituali degli italiani emigrati nelle Americhe, Piacenza 16 febbraio 1887*, in AGS / BA 01-02-04 a,b,c.; now published in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., p. 195.

[36] Scalabrini, *L'emigrazione degli operai italiani*, cit., p. 298.

[37] «It is also of note – Scalabrini wrote in 1887 – that our compatriots are typically eminently flexible in nature, so that they easily adapt to the conditions of the places and peoples among which Providence leads them. The religious and moral future of our colonies in America will therefore depend on how much religion and morality these first populations will retain. Will they be informed

view, abandoning one's homeland and community of origin (geographical uprooting), the weakening of parental and community ties (affective uprooting), the real 'estrangement', finally, and the loss of the traditional points of reference that emigration abroad involves (cultural disintegration and loss of identity) constituted, in his opinion, the terrible bases for disaffection from traditional moral and religious values, for abandoning the Christian faith:

> But, gentlemen, who could describe – he asked – the dangers which our poor emigrants are facing in relation to the religious life? […] The sense of nationality is lost, and with it, something that pains the heart to think about, the sense of the Catholic Faith. […] The loss of that spiritual bread which is the word of God, the impossibility of being reconciled with Him, the lack of worship and any encouragement towards the path of the good, exert, gentlemen, a deadly influence on the morale of the people[38].

It was a firm belief of Msgr. Giovanni Battista Scalabrini, which was destined to exercise considerable influence on his vision of the religious and pastoral care of Italian emigrants abroad that the preservation of the ethnic-cultural elements (including the mother tongue) was necessarily the most incisive and indispensable form of defence and maintenance of that 'popular' faith so tenaciously tied to the traditions and values of origin and so greatly threatened, if not compromised, in the new environments in which the migrants arrived. A faith, that of the Italian peasants and workers who emigrated abroad, which needed the concrete presence of the Church and of the 'apparatus' of religion:

> Even the educated man – wrote the bishop of Piacenza – is at risk of losing his Faith, but to a lesser degree because his education, his culture, his theoretical knowledge of Religion, somehow managed to save him from icy indifference, and he can, if nothing else, associate himself with the thought of the Divine Mysteries, which are celebrated elsewhere, and feed his mind with moral readings. But how could the poor son of the soil rise to such lofty thoughts? For him, more than for others, the concept of religion is inseparably tied to that of the Temple and the Priest. Where every tangible religious apparatus is silent, he gradually forgets his duties towards God and the Christian life in his spirit becomes bloodless and dies[39].

about civil and Christian sensibilities? […] The tendency then of our emigrants to settle in colonies should not be overlooked as this will make the task of those who will have to guide them less difficult. To neglect it now that it is a question of carefully choosing the location of future cities and of giving them that character of religiosity and Italian spirit, on which their prosperity and their importance must depend, would be an unforgivable mistake. That character must be impressed immediately. Any delay would, I think, be fatal. That character will be, to say the least, like the bond that will unite them inextricably to their remote homeland, since beyond material interests, it is the communion of religious and patriotic sentiments that will cement the unbreakable unity of a people» (*L'emigrazione italiana in America. Osservazioni di Giovanni Battista Scalabrini, Vescovo di Piacenza*, cit., pp. 226-227).

[38] Scalabrini, *L'emigrazione degli operai italiani*, cit., pp. 295-296.

[39] *Ibid*., pp. 296-297.

On the basis of these convictions, Msgr. Scalabrini developed his original idea of a *religious institute* dedicated mainly to the pastoral care of the Italian emigrant populations, in particular those who landed on the American continent: a non-provisional, but to a large extent definitive emigration.

The religious institution that the Lombard prelate yearned for would be able to reproduce in the places of Italian emigration the characteristics of the ecclesiastical community of origin, which, with particular reference to the Venetian and Lombard religious tradition, focused on the parish priest and the parish and was characterized by a community pastoral ministry whose basic dimensions were the liturgy and the dispensation of the sacraments, the catechesis and the exercise of the most widespread devotional practices.

A pastoral ministry capable of promoting a faith able to nurture individual and community identity and inspire and give life to social and supportive works for the life of local communities: savings banks, workers' cooperatives, ethnic schools and all those forms of solidarity and support for the most vulnerable subjects that became indispensable in the new and difficult environments of Italian emigration overseas.

Of great interest, in this regard, is the *original Regulation of the Congregation of the Missionaries of Saint Charles* developed by Msgr. Giovanni Battista Scalabrini on 19 September, 1888. The first chapter specified the following:

> The purpose of this Congregation was to keep the Catholic faith alive in the hearts of our fellow immigrants and to seek, as far as possible, their moral, civil and economic well-being. The Congregation fulfils this purpose by: 1. - Sending missionaries and teachers wherever required by the needs of emigrants; 2. - Erecting Churches and Oratories and founding Missionary Houses in the various centres of the Italian Colonies, from which their civilizing action can spread through temporary excursions; 3. - Establishing schools, where with the first rudiments of the Faith the elements of our language, arithmetic and homeland history are imparted to the children of the colonists; […] 4. - Promoting and encouraging those associations and works which will be deemed most suitable for preserving the Catholic religion and Italian culture in the colonies themselves[40].

Equally significant are the subsequent chapters of the original *Regulation*, where, in particular, there is mention of the need to establish Italian schools for the children of the immigrants on the American continent and to entrust their oversight preferably to lay assistants of the congregation:

> Chapter IV: *Internal Discipline* – The Lay Office will be to […] assist and support the Missionaries in the exercise of their duties. 6. Those among the laity who are qualified teachers or who have sufficient education will be employed in teaching reading and writing, counting, history of the fatherland and especially the Catechism. […] Chapter XI: *Establishing schools* – 1) In addition to the spread and increase of Religion, the Missionary

[40] *Regolamento della Congregazione dei Missionari di San Carlo*, [19 settembre] 1888, in AGS / DE 22-04-07 b; now published in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., pp. 201-202.

must also promote education in the Colonies. So care will be taken to understand the importance and usefulness of schools, where the Italian language and culture will have to be kept alive. 2) The teachers will have to be chosen, possible and preferably, from among the lay assistants of the Institute. 3) The loans agreed with the heads of the Colonies will be used to establish these schools and their timetables[41].

In the subsequent *Rules of the Congregation of the Missionaries of St. Charles for Italian emigrants*, approved in 1895, the part relating to schools was better defined:

Chapter XIII – Establishment of schools. 1. In addition to the spread and increase of Religion, the Missionary must also promote education in the Colonies. Care will therefore be taken to understand the importance and usefulness of schools, in which he will preferably teach, with elements of arithmetic and writing, the Italian language and the language of the [host] country. 2. The teachers will have to be chosen, possible and preferably, from among the lay brothers of the Congregation. 3. The loans agreed with the local director of teaching and with the heads of the Colonies will be used to establish these schools and their timetables [42].

With regard to the spiritual system conferred by Msgr. Giovanni Battista Scalabrini to the new religious institute of the Missionaries of St. Charles Borromeo for emigrants, it seems possible to say that we are faced with an ad hoc priestly spirituality, which recovers the great ascetic tradition of post-Tridentine Catholicism is recorded: from Vincent Depaul to François de Sales and Alfonso Maria de' Liguori[43].

In this regard, Chapter XII of the *Rules of the Congregation* of 1888, to which we have already referred, fully reflects that 'benignist' spirituality so dear to the holy bishop of Geneva and widely present in Scalabrini's pastoral documents[44]:

41 *Ibid*., pp. 204 and 210.

42 *Regola della Congregazione dei Missionari di S. Carlo per gl'Italiani emigrati*, Piacenza, Tip. Vescovile G. Tedeschi, 1895; now re-edited in Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, cit., pp. 237-238.

43 See A. Prandi, *Correnti e figure della spiritualità cattolica nei secc. XIX e XX*, in *La Chiesa cattolica nella storia dell'umanità*, 7 vols., Fossano, Esperienze, 1966, Vol. V, pp. 91-97; M. Petrocchi, *Storia della spiritualità italiana*, edited by P. Borzomati, Torino, SEI, 1996; But see also the large and documented overview produced by M. Marcocchi, *Scritti di spiritualità e vita religiosa tra Cinquecento e Novecento*, Brescia, Morcelliana, 2006.

44 See M. Francesconi, *La spiritualità di mons. Scalabrini*, in G. Rosoli (ed.), *Scalabrini tra vecchio e nuovo mondo. Atti del Convegno Storico Internazionale (Piacenza, 3-5 dicembre 1987)*, cit., pp. 203-221. But see also G. Parolin, A. Lovatin (edd.), *L'ecclesiologia di Scalabrini. Atti del II Convegno Storico Internazionale (Piacenza, 9-12 novembre 2005)*, Roma, Urbaniana University Press, 2007. A valuable document of the ascetic addresses of the bishop of Piacenza consisting of all his pastoral letters, now collected and annotated in G.B. Scalabrini, *Lettere Pastorali 1876-1905*, edited by O. Sartori, Torino, Società Editrice Internazionale, 1994. A rich source of reference is also provided by the wealth of correspondence between Msgr. Scalabrini and the Bishop of Cremona, Msgr. Geremia Bonomelli: C. Marcora (ed.), *Carteggio Scalabrini Bonomelli (1868-1905)*, Roma, Studium, 1983.

Chapter IV: *Life of the Missionaries in the Missions* – The Missionary as an evangelical worker must remember his obligation to spread the sweet aroma of Jesus Christ with his life and to preach the Gospel more by deeds than by words. He will therefore take care […] above all to preach the inherent virtues of his ministry: charity, sweetness, purity, sobriety, modesty, simplicity[45].

Above all, François de Sales (1567-1622), in fact, constantly crops us as a model and source of inspiration in Msgr. Giovanni Battista Scalabrini's writings on the priesthood and religious life: the holy Bishop of Geneva, as is well known, proposes a spiritual perspective characterized by abundant practicality, rich in psychological knowledge, devoid of complications, nourished by everyday life and a sense of proportion.

He proposes a priestly ideal centred on the exercise of warm, affectionate piety, inspired by strong Christian optimism: charity and sweetness represent the most suitable way to win souls for God; loving kindness is proposed as a lifestyle, but also as a pastoral and educational style, as a more effective way of educating the people to faith.

The central point of François de Sales' teaching is that Christian perfection – or holiness – is not a privileged state, the prerogative of a minority of elected representatives; Christian perfection can be achieved by all the faithful regardless of their living conditions; it is achieved not by virtue of heroic deeds or particular religious practices, but through the fulfilment by the Christian of the duties deriving from his living conditions and the exercise of ordinary virtues[46].

With this perspective, it is clearly understood that the world becomes the place in which the Christian is called to achieve his perfection; daily life is the 'normal' context in which every believer can fulfil his vocation to Christian perfection.

In essence, the pastoral ministry (and a spirituality) proposed by François de Sales and appropriated by the Lombard prelate is adjusted to human frailty, capable of restoring meaning to the faith of the many subjects who had been 'uprooted' and 'lost' due to the forced abandonment of their place of origin; able to restore the unity between the civil identity and religious affiliation of the immigrant.

It should also be noted that François de Sales himself, and Vincent Depaul, are the points of reference of Msgr. Giovanni Battista Scalabrini for the foundation, in 1895, of the women's branch of the Missionaries of Saint Charles Borromeo for the emigrants (Scalabrinian Missionary Sisters).

[45] *Regolamento della Congregazione dei Missionari di San Carlo*, [19 settembre] 1888, cit., pp. 209-210.

[46] See R. Sani *Indirizzi spirituali e proposte educative dei nuovi istituti religiosi dell'Ottocento*, in Id. (ed.), *Chiesa, educazione e società nella Lombardia del primo Ottocento. Gli Istituti religiosi tra impegno educativo e nuove forme di apostolato (1815-1860)*, cit., pp. 124-138.

In a report sent in August 1900 to the Sacred Congregation for the Propagation of the Faith, for example, the Lombard prelate underlined how, for the creation of his women's religious institute, he had taken the Company of the Daughters of Charity of Vincent Depaul as his model as «they work as a small group of four and without pretensions have established the first schools; they teach catechism, and, where possible, assist the sick with all the caution that prudence and experience recommend»[47].

It is also known, moreover, that for the drafting of the *Constitutions and Rules* to be observed by the Missionaries of St. Charles Borromeo for emigrants, the Bishop of Piacenza was directly and largely inspired «by the Constitutions of the Sisters of the Visitation, founded by St. Francis de Sales»[48].

4. *An* «ethnic pastoral ministry» *for the community of Italian emigrants in the Americas: Msgr. Giovanni Battista Scalabrini and the first developments of the Scalabrinian Congregation in Brazil (1888-1905)*

Msgr. Giovanni Battista Scalabrini and his Missionaries of St. Charles Borromeo, from the beginning, offered a pastoral ministry for Italian emigrants in the American continent that aimed,

on the one hand, to safeguard the cultural identity and to nourish the sentiment of the distant homeland and, on the other, to offer once again, especially in the rural environments of the American continent, the ecclesiastical and religious dimension and the devotional customs and practices characteristic of the places of origin of the populations.

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[49], managed the religious and moral assistance of Italian emigrants both in the central and northern states (São Paulo, Minas Gerais, Espirito 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[50]; and in the southern states (Paranà,

47 G.B. Scalabrini, *Relazione dell'opera dei Missionari di S. Carlo per gli emigrati italiani*, 10 agosto 1900, in *Scritti di mons. G.B. Scalabrini (ad uso interno)*, in AGS, 103/8, (on p. 182 of the second volumen of the collection of Scalabrinian writings).

48 See *Brevi cenni sulla fondazione e sviluppo della Congregazione delle Suore Missionarie di S. Carlo anteriormente denominate Ancelle degli orfani e dei derelitti all'estero*, in AGS, 103/7, p. 3. Further confirmation can be found in E. Martini, *Memorie sulla fondazione della Congregazione delle Suore Missionarie di San Carlo Borromeo – Scalabriniane*, in AGS, 103/8.

49 See, for example, M. Francesconi, *Storia della Congregazione Scalabriniana. III. Le prime missioni nel Brasile*, Roma, CSER, 1975.

50 Cfr. G. Rosoli, *Chiesa ed emigrati italiani in Brasile: 1880-1940*, in *Chiesa ed emigrazione italiana tra '800 e '900*, «Studi Emigrazione», vol. XIX, n. 66, 1982, pp. 225-251; e A. Trento, *Là*

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 redemption[51].

For each of the two types of settlements of Italian immigrant communities, the Scalabrinian brothers and sisters developed pastoral approaches, methods and tools adapted to the particular features of the environment and the specific needs of the populations.

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 families. These visits, which could sometimes last for several months, were conducted by the missionaries using the vast Sorocabana, Mogiana and Paulista railway network, then on foot or on horseback to the plantations.

It was an original and very effective set-up of pastoral activity «suitable for large spaces, with a central location and constant radial action. This ensured the continuity of the missionary presence in a more important location and, at the same time, visits to peripheral groups scattered throughout a vast territory were guaranteed».

Not surprisingly, it was precisely because of the demanding work of the «flying missions» that, in just a few years, about 150 churches were 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[52].

Equally original, and destined to have a significant impact on the pastoral life and religious practice of the Italian communities in Brazil, was the choice of the Scalabrinian missionaries to safeguard «the specificity of the actual work among the emigrants by obtaining – often after considerable difficulties – the titles of 'cappellania curate' for Italian emigrants, a type of personal parish based on the national parishes of the United States».

This made it easier to give life to the religious practice of the communities and «give continuity to their work for the most marginalized categories that were the emigrants, by helping their integration into the heart of the local ecclesiastical structures».

dov'è la raccolta del caffè. L'emigrazione italiana in Brasile, 1875-1940, Padova, Antenore, 1984.

51 See G. Rosoli, *Le organizzazioni cattoliche e gli emigrati italiani in Brasile*, in R. De Felice (ed.), *L'emigrazione italiana in Brasile 1800-1978*, Torino, Fondazione G. Agnelli, 1980, pp. 191-233; e Id., *L'emigrazione italiana nel Rio Grande do Sul, Brasile meridionale*, «Altreitalie. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. V, n. 10, 1993, pp. 5-22.

52 G. Rosoli, *Le organizzazioni cattoliche e gli emigrati italiani in Brasile*, in De Felice (ed.), *L'emigrazione italiana in Brasile 1800-1978*, cit., pp. 191-233.

In several places, however, Italian schools were already established towards the end of the nineteenth century, with their management entrusted, in most cases, to the Scalabrinian Sisters or to the sisters of other women's congregations.

And it was the appearance of the schools, next to the churches erected in «cappellania curata», that was destined, as Gianfausto Rosoli rightly mentions, to bring about a qualitative shift in the experience of Italian emigrant communities in Brazil: «This cultural event started an important stage towards the progress of those communities, hitherto forced to concern themselves with economic survival»[53].

In the context of the pastoral initiatives carried out by the Scalabrinian Missionaries in the American continent, the religious care exercised in the Italian agricultural colonies that arose in Paranà, Santa Catarina and Rio Grande do Sul was of primary importance.

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 Trento[54].

[53] Rosoli, *Chiesa ed emigrati italiani in Brasile: 1880-1940*, in *Chiesa ed emigrazione italiana tra '800 e '900*, cit., pp. 227-229.

[54] «The northern origin – Gianfausto Rosoli rightly observed – is clearly predominant in Italian emigration to Brazil. Even throughout an entire century, Veneto has provided the highest share: it alone represents over a fifth of the total flow, followed by Campania (13 per cent), Calabria (11 per cent), Lombardy (8.5 per cent). But particularly in the first period, the absolutely majority of emigration to Brazil is Venetian: it represents 64 percent of the Italian flows to Brazil in the first five years (1887-91) – one hundred and seventy-one thousand out of two hundred and seventy thousand – and 36.5 percent during the last two decased of the nineteenth century. Both the workers who were went to the so-called free colonization system in the southern states (Rio Grande do Sul, Santa Catarina, Paraná) and those who went to the fazendas of the São Paulo state were initially mainly from the North. […] For the period 1887-1902, it is of note that more than one in three emigrants was originally from Veneto, in particular from Vicenza, Treviso and Belluno. In the 26 oldest municipalities colonized by Italians in Rio Grande do Sul two thirds of the immigrants were of Venetian origin and the rest form Lombardy (G. Rosoli, *L'emigrazione italiana nel Rio Grande do Sul, Brasile meridionale*, «Altreitalie. Rivista internazionale di studi sulle migrazioni italiane nel mondo», vol. V, n. 10, 1993, pp. 9-10). But see, in particular: R. Venerosi-Pesciolini, *Le colonie italiane nel Brasile meridionale*, Torino, Italica Gens, 1914; M. Sabbatini (ed.), *La regione di colonizzazione italiana in Rio Grande do Sul*, Firenze, Cultura cooperativa, 1975; T. Azevedo, *Italianos e gauchos*, Porto Alegre, 1975; R. Costa, *Antropologia visual da imigração italiana*, Caxias-Porto Alegre, EST-EDUCS, 1976; A. Gasperin, *Vao simbora. Relato de imigrantes italianos da Colonia Princesa Isabel do Rio Grande do Sul*, Porto Alegre, Escola Superior de Teologia São Lourenço de Brindes,1984; *Presenza, cultura, lingua e tradizioni dei veneti nel mondo. Parte I, America Latina. Prime inchieste e documenti*, Venezia, Regione Veneto, 1987; R.M. Grosselli, *Da schiavi bianchi a coloni. Un progetto per le fazendas. Contadini trentini (veneti e lombardi) nelle foreste brasiliane. Parte IV, São Paulo 1875-1914*, Trento, Provincia Autonoma di Trento, 1991; S. Borges, *Italianos: Porto Alegre e trabalho*, Porto Alegre, ESR Edições, 1993.

For these populations, the Scalabrinian brothers and sisters developed an *ad hoc* pastoral ministry, which, among other things, aimed to support and strengthen the desire and commitment of the Italians emigrated to the American continent to preserve their roots and ethnic identity. The pastoral ministry advocated by the disciples of Msgr. Scalabrini, that essentially aimed to reproduce the forms and characteristics of religious life and the experience of faith that Italian emigrants had experienced in the ecclesiastical communities of origin.

It would suffice here to refer to the almost obsessive care taken to ensure that the churches built in the agricultural colonies would reproduce the architecture, furnishings and sacred iconography (traditional saints etc.) characteristic of the religious buildings of the territories of origin of the settlers, almost to the point of forming a set of rural parishes in Veneto or Trentino or Lombardy transplanted to Brazilian agricultural areas. As well as the establishment of lay brotherhoods and other forms of religious aggregation, on the model of the motherland, the solemn celebration of the main sacred anniversaries of the places of origin and the revival in the grand style of the most common devotional practices of the places of origin. Finally, the systematic use of the Venetian or Trentino or Lombard dialects in preaching and catechesis and the assiduous catechetical activity (children, youth etc.) and the equally assiduous sacramental practice based on the typical standards of religious piety in northern Italy[55].

A pastoral ministry that was promoted in the Italian colonies of Brazil by the Scalabrinian brothers and sisters, and which focused, as in the rural situations of northern Italy in the nineteenth century, on the close link between the religious dimension and the social and civil experience of the communities, in which the parish priest and the parish were the main point of reference for all aspects of community life. Not only, therefore, the life of piety and religious practice.

In this scenario, the parish priest was the main promoter of social works, the guarantor of community life, the authoritative and sometimes the only point of reference in the institutional and political void in which Italian emigrants found themselves abroad. He often also embodied the role of founder, director and principal sponsor of works such as savings banks, agricultural cooperatives, men's and women's schools, the press in Italian, the various forms of solidarity and relief institutions and support for the vulnerable (orphanages, medical clinics, refuges and hospices for the elderly, etc.)[56].

[55] See G. Terragni, *Scalabrini e la Congregazione dei Missionari per gli Emigrati. Aspetti istituzionali 1887-1905*, Napoli, Autorinediti, 2014; e Id., *P. Pietro Colbacchini. Con gli emigrati negli Stati di S. Paolo, Paranà e Rio Grande do Sul 1884-1901. Corrispondenza e scritti*, Napoli, Autorinediti, 2016. See also the studies focusing on certain significant experiences: C.A. Zagonel, *Igreja e imigração italiana*, Porto Alegre, EST/Sulina, 1975; A.P. Balhana, *Santa Felicidade. Uma paroquia veneta no Brasil*, Curitiba, Fundação Cultural di Curitiba, 1978; F.L. Machioski, *A prática da religião católica e a preservação da identidade étnica italiana. Municipio de Colombo, Paraná, 1878-2008*, Curitiba, Universidade Tuiuti do Paraná, 2009.

[56] For an in-depth survey of the characteristics and role played by the Venetian rural parish in the nineteenth century, which was intended to constitute a real model for the Italian colonies in

Conclusions

In 1993 Gianfausto Rosoli, in an important work dedicated to *Italian emigration in Rio Grande do Sul*, rightly stated that:

> Italian emigration to southern Brazil […] had the opportunity to recreate and model the new economic and social situation almost by duplication based the archetypes of the homeland, a communicative-linguistic, social and religious 'transplant' in what appeared to their peasant expectations to be the new 'promised land'. The favourable factors were the particular group cohesion and the continuity of anthropological characteristics, which can be found up to the third and fourth generations.

He added:

> The compactness of the original nucleus and the considerable initial homogeneity, allowed for continuity of habits and customs, domestic traditions, including food, family and collective traditions, the preservation of a common language – a very exceptional case in the panorama of large migrant communities. It was actually a Venetian speech, due to the precision of a *koiné* of dialects dominated by the Veneto region, which have experienced a unique continuity in social communications up to the present day[57].

We can therefore say that in the above-mentioned process of «recreation» of the «new economic-social reality» of Brazil «based on the archetypes of the homeland» (Veneto, Lombardy, Trentino or some other region of the Italian peninsula), as well as in the process of «maintaining customs and traditions, domestic traditions, including food, family and collective», and «preserving a common language of communication», a non-secondary role was played by the many ecclesiastics and missionaries who took care of the assistance and pastoral care of the many thousands of Italians who, at the turn of the twentieth century, were forced to emigrate to the American continent, first of all the Missionaries of the Saint Charles Borromeo founded by the Bishop of Piacenza, Msgr. Giovanni Battista Scalabrini with the aim of «providing for the spiritual needs of many hundreds of thousands of our compatriots».

Brazil, see in particular: A. Gambasin, *Parroci e contadini nel Veneto alla fine dell'Ottocento*, Roma, Edizioni di Storia e Letteratura, 1976; A. Lazzaretto Zanolo, *Parroci ed emigranti nel vicentino del primo Novecento*, in A. Cestaro (ed.), *Studi di storia sociale e religiosa. Scritti in onore di Gabriele De Rosa*, Napoli, Ferraro, 1980, pp. 1089-1118; A. Lazzarini, *Campagne venete ed emigrazione di massa (1866-1900)*, Vicenza, Istituto per le ricerche di storia sociale e religiosa, 1981.

[57] Rosoli, *L'emigrazione italiana nel Rio Grande do Sul, Brasile meridionale*, cit., pp. 5-22.

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Prácticas útiles para enseñar hoy a leer contenidas en una cartilla hispanoamericana del siglo XIX

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Useful practices to teach reading today contained in a XIXth Century Spanish-American primer

ABSTRACT: The object of this paper is to highlight the literacy primer *Paso a paso*, by José Henriques Figueira, for its relevance to teaching of reading and writing. This book, little known in Spain, was very popular in Uruguay or Argentina at the end of the 19th century and the beginning of the 20th. The content and the form of this didactic material is analyzed to verify what are the pedagogical foundations on which it is based and to evaluate if they could somehow be transferred today to the school practice.

EET/TEE KEYWORDS: Literacy methods; Early childhood education; Primers; Educational Innovations; South America; XIXth Century.

Introducción

Con este trabajo trataremos de mostrar cómo la labor pedagógica en torno al proceso de enseñanza y aprendizaje de la lectoescritura hunde sus raíces en el magnífico (y no siempre reconocido) trabajo de maestros que, en siglos pasados,

se encontraron con problemas similares a aquellos con los que se enfrentan los profesionales de nuestro tiempo, de modo que pondremos de manifiesto cómo muchas de las fórmulas que se aplicaron entonces para resolver estas dificultades se fundamentan en presupuestos teóricos que pueden ser no solo válidos, sino de gran utilidad, en la escuela actual. Concretamente, en nuestro artículo se analiza el contenido de la cartilla de lectura Paso a paso, de Figueira, que fue un texto poco conocido en España, pero muy popular durante algún tiempo en Uruguay o Argentina.

1. *Los esfuerzos para una renovación pedagógica en Latinoamérica a finales del XIX*

La avanzada reflexión pedagógica en las jóvenes repúblicas americanas contrasta con cierto inmovilismo en la antigua Metrópoli, salvo por iniciativas emergentes y aún aisladas, como la de la Institución Libre de Enseñanza o por las Escuelas del Ave-María[1]. Es cierto que la escuela, los métodos y los libros de texto mejoran mucho desde mediados del XIX con respecto al Antiguo Régimen, como ha señalado Viñao en diferentes ocasiones[2], pero la teoría pedagógica en España adolece de un retraso cuyas consecuencias se reflejan en la acrítica edición de cartillas de leer que repiten una y otra vez el mismo modelo. Llama la atención, a este respecto, el voluntarismo de muchos autores que anuncian con convencimiento que el suyo sí que es el método definitivo, por más que en casi todos estos textos se perciba la carencia de un sustento teórico para aspectos esenciales como la psicología infantil o la fisiología de la lectura. A lo más que alcanzan es, en todo caso, a organizar una secuencia didáctica que considere las particularidades grafofonéticas y silábicas de la lengua castellana y los problemas derivados de la distinta tipografía. Por ejemplificar estos casos con algunos títulos, destacamos, entre decenas de cartillas, las de Aguilar (1888), Alfaro (1872), Arias (1877), Monroy (1876), Roca (1898) o Solana (1904).

Afrontamos esta realidad en otro trabajo que aún se encuentra en revisión y, como decimos, no nos detendremos más. Pero sí deseamos incidir en lo diferente

[1] J.M. Hernández Díaz, *Espacios escolares, contenidos, manuales y métodos de enseñanza*, in J.-L. Guereña, J. Ruiz Berrio, A. Tiana Ferrer (edd.), *Historia de la educación en la España contemporánea. Diez años de investigación*, Madrid, Ministerio de Educación y Ciencia, 1994, pp. 191-213; A. Viñao Frago, *Del garabato y los palotes a la escritura: notas sobre la génesis y el concepto de preescritura*, «History of Educacion & Children's Literature», vol. VII, n. 1, 2012, pp. 45-68.

[2] Cfr. A. Viñao, *Liberalismo, alfabetización y primeras letras (siglo XIX)*, «Bulletin Hispanique», vol. 100, n. 2, 1998, pp. 531-560; A. Viñao, *La enseñanza de la lectura y la escritura: análisis socio-histórico*, «Anales de Documentación», vol. 5, 2002, pp. 345-359.

que es la situación al otro lado del Atlántico (y en gran parte de Europa o Estados Unidos, de donde han bebido los pedagogos hispanoamericanos).

En Hispanoamérica, por resumir *grosso modo*, hallamos libros de lectura distintos: la propia manera de titular, sin ir más lejos, difiere de la que se conoce en España, donde se siguen usando denominaciones como *Método de lectura*, *Catón*, *Silabario* o *Cartilla para leer*. Los nombres de los textos en Chile, Argentina, Uruguay o México son más comerciales y sugerentes: *Paso a paso*, *¡Adelante!*, *El Nene*, *Dos amigos*, *El libro de los niños*, *¡Upa!* y así un largo etcétera. Son frecuentes en estos libros las ilustraciones, incluso fotografías en color. Pero, lo más importante, el texto suele ir acompañado en el prólogo o en anexos de orientaciones para los maestros que explicitan el fundamento teórico, científico o, al menos, racional, sobre el que se sustenta el método.

Así, por ejemplo, imperaba en España una concepción de la enseñanza básica que relegaba el aprendizaje de la escritura hasta que el alumno hubiera avanzado en los rudimentos de la lectura, y muy limitado, además, a la mera copia o a la técnica caligráfica. Basta leer tratados de pedagogía de mediados del XIX, como el de Avendaño y Carderera[3], para comprobar que los maestros no eran capaces de sustraerse a la idea de que lo principal era realizar bien los trazos. Pero allende las fronteras hubo autores del XIX, como Juan Bautista Graser y sus discípulos, que ya ponían el foco en la escritura como actividad intelectual, mucho más allá de la caligrafía, y basándose en estos presupuestos y en otros similares, la escritura como medio de aprendizaje de la lectura fue una recomendación habitual de los pedagogos hispanoamericanos finiseculares, como Matte en Chile, Rébsamen en México o Berra en Uruguay[4]. Tan frecuente era esta praxis que aparece recogida incluso en escritos de docentes de educación elemental, como el de esta maestra de la República de Ecuador[5], que propone un método basado en varias cartillas de la época:

> La ley de asociación rige la enseñanza en general y también la de la lectura en particular, por cuanto esta asignatura puede y debe enseñarse simultáneamente con la escritura. En apariencia parece que se distraen las facultades del alumno al enseñarle á escribir […], pero esto no es más que un error, porque en realidad, con la escritura no hace más que afianzar los conocimientos ya adquiridos y conseguir la importante aptitud de leer […]. La lectura y la escritura se comprenden y se facilitan recíprocamente […]. Por lo que se ve que en la escritura debe considerarse principalmente, más que el dibujo ó forma del signo, su

[3] J. Avendaño, M. Carderera, *Curso elemental de pedagogía*, 3ª ed., Madrid, Victoriano Hernando, 1855.

[4] Cfr. F. Berra, *Los métodos de lectura con motivo de las opiniones de D. Albino Benedetti*, Montevideo, Dornaleche y Reyes, 1889; K. Hernández, K. Herrera, *Importancia del Método Matte en la enseñanza de la lectura en Chile*, «Comunicaciones en Humanidades», vol. 1, 2012, pp. 189-195; M.A. Rodríguez Álvarez, *El método que hizo divertido aprender a leer y escribir*, in M.A. Rodríguez (coord.), *Sendas y matices en la obra pedagógica de Gregorio Torres Quintero*, Colima, Universidad de Colima, 2012, pp. 81-134.

[5] M. Villaverde, *Lectura y escritura. Método analítico-sintético*, Quito, Juventud, 1900, p. 69.

relación con el sonido que representa y la disposición que deben guardar para que expresen la palabra hablada.

Lo mismo sucede también con el debate sobre la idoneidad de métodos basados en procesos analíticos o sintéticos. Es cierto que a lo largo del XIX se ha superado la praxis del deletreo, pero lo que hacen los autores españoles es proponer frases mnemotécnicas, como la "chafallada" de Vallejo, sobre quien hemos escrito recientemente[6], a partir de las cuales mostrar un listado de sílabas posibles en castellano, cuando en el Nuevo Mundo los pedagogos decimonónicos traducen a los defensores de nuevos métodos, como hace José Pedro Varela con Norman Calkins y sus propuestas didácticas sobre aprendizaje a partir de la observación atenta de objetos conocidos[7].

Frente a las circunstancias españolas, insistimos, la tarea de alfabetización en Hispanoamérica es bien distinta. Según adelantamos al inicio de estas líneas, nos centraremos en este trabajo en Figueira y su producción didáctica, de la que destacamos la cartilla *Paso a paso*, como paradigma de nuestra exposición.

2. *La obra de Figueira*

El plan de enseñanza de la lectura y la escritura

José Henriques Figueira es una de las figuras más relevantes de la cultura uruguaya de finales del XIX y primera mitad del XX. Nacido en Montevideo, de ascendencia portuguesa, se formó en Francia y Alemania y contribuyó, una vez regresado a América, a la renovación del sistema educativo elemental de su país, aunque su prolífica producción abarca además otros campos diversos, desde la antropología, hasta la creación literaria[8].

Figueira escribió una serie de cinco libros para la enseñanza de la lectura y la escritura, a partir de otro autor uruguayo, Vásquez Acevedo, que fue quien introdujo esta idea de publicar cartillas en una sucesión graduada[9]. De estos libros, *¿Quieres leer?*, de 1892, era el texto del curso inicial o preparatorio, con el subtítulo «Método analítico-sintético para la enseñanza elemental de la lectura y la ortografía»; *¡Adelante!*, publicado por primera vez en 1899, y *Un buen amigo*, de 1900, eran los textos para el curso segundo o elemental, que

[6] V. Calvo Fernández, N. Anaya-Reig, *La aportación de José Mariano Vallejo a la enseñanza de la lectura en la España del siglo XIX*, «Revista Complutense de Educación», en prensa.

[7] E. Mena, A.L. Palomeque, *Historia de la educación uruguaya*, Montevideo, De la Plaza, vol. II, 2011.

[8] A. Scarone, *Uruguayos contemporáneos. Nuevo diccionario de datos biográficos y bibliográficos*, Montevideo, Barreiro y Ramos, 1937.

[9] Mena, Palomeque, *Historia de la educación uruguaya*, cit.

llevaban por subtítulo «Lecciones y ejercicios normales de lectura, escritura corriente y ortografía usual»; y los otros dos, *Trabajo*, también de 1900, y *Vida*, que vio la luz en 1902, para los niveles intermedio y superior respectivamente, estaban dedicados al perfeccionamiento de la actividad lectora y llevaban el subtítulo de «Lectura expresiva y literatura»[10]. El nombre *Paso a paso*, esta vez con el mismo subtítulo de *Adelante* y *Un buen amigo*, sustituyó a *¿Quieres leer?* en las ediciones argentinas a partir de 1907 y en el marco de la renovación normalista que fue diseñada en aquel país. Para este trabajo nosotros hemos manejado una edición de 1925 disponible en el fondo digital de la Biblioteca Nacional de Maestros de Argentina.

El libro, al igual que todos los textos de la serie, responde a un plan racional definido de antemano y construido sobre presupuestos pedagógicos bien perfilados. De hecho, el mismo año de edición de *¿Quieres leer?* el autor publica un opúsculo con el título *Instrucciones para la enseñanza de la lectura elemental y de la ortografía, según el método analítico-sintético*[11], donde se expone con acendrado detalle desde la temporalización de los contenidos hasta la praxis más concreta con que ha de proceder el maestro en el aula para enseñar los contenidos, lo cual incluye también los recursos materiales de los que debe servirse. Por ejemplo, se recomienda dedicar dos meses a ejercicios orales de dicción, a actividades de preescritura – «líneas y curvas sencillas, de suerte que la mano se halle educada para la escritura»[12] y a realizar letras, a modo de dibujo sin dar en ningún momento su nombre. Esta planificación temporal se encuentra bastante detallada y no dista de la que encontraríamos hoy en los materiales para la enseñanza de la lectoescritura de cualquier editorial.

Idéntico rigor encontramos en las prescripciones sobre la dinámica de la clase y el uso de los medios materiales. Figueira determina el orden que ha de seguir el profesor en sus explicaciones. En primer lugar, se llevan a cabo ejercicios orales partiendo de palabras cuidadosamente seleccionadas que, como veremos enseguida, reciben el nombre de «palabras guías" o «normales»[13]. Estas palabras han de ser pronunciadas con claridad, primero por el maestro y, seguidamente, a coro por los alumnos; después, se procede a escribir esas mismas palabras en la pizarra mural, donde se descomponen en sílabas y en

[10] B. Braslavsky, *Para una historia de la pedagogía de la lectura en la Argentina. ¿Cómo se enseñó a leer desde 1810 hasta 1930?*, in H.R. Cucuzza (dir.), P. Pineau (codir.), *Para una historia de la enseñanza de la lectura y escritura en Argentina. Del catecismo colonial a La Razón de Mi Vida*. Madrid, Miño y Dávila, 2002, pp. 35-49; M. Oroño, *Las representaciones sociolingüísticas en textos escolares de la educación primaria uruguaya: las series de libros de lectura de Vásquez Acevedo, Figueira y Abadie-Zarrilli*, Tesis doctoral, Universidad de la República de Uruguay, Montevideo, 2013.

[11] J. H. Figueira, *Instrucciones para la enseñanza de la lectura elemental y de la ortografía según el método analítico-sintético*, Montevideo, Dornaleche y Reyes, 1892.

[12] *Ibid*., p. 11.

[13] J. H. Figueira, *Paso a paso. Nuevo método directo y rápido de lectura escritura corriente y ortografía usual*, Buenos Aires, Cabaut, 1925, p. 1.

sonidos. Los alumnos tienen que copiarlas en sus pizarritas personales y después escribirlas al dictado, tanto enteras como divididas en sílabas. A continuación, los niños leen los carteles fijos dispuestos en el aula donde se encuentran esas palabras en caracteres grandes. Después, se emplea el libro para seguir la lección correspondiente, y son los propios niños los que se corrigen. El profesor y, posteriormente, los alumnos usan las palabras aprendidas en enunciados, procurando dar la entonación adecuada. Finalmente, se realiza otro dictado con las nuevas palabras nuevas aprendidas y no se pasa a una nueva lección hasta que ese dictado es realizado satisfactoriamente[14].

Un resumen de estas indicaciones se encuentra también en las Notas previas de *Paso a paso*[15]. Además, hay orientaciones mucho más sucintas para profesores a pie de página en cada lección. Por ejemplo, cuando aparece por vez primera una palabra con sílaba inversa (V+C), como sucede con «espejo / es-pe-jo», para la que se anota al final de la página: «NOTA - Hágase observar a los alumnos el lugar que ocupa la consonante con respecto a la vocal en las sílabas inversas. No se les debe enseñar todavía los nombres de sílabas directas, inversas, etc.»[16] [en todas las referencias, la negrita es del propio texto].

Hablábamos de un plan pedagógico. En efecto, Figueira se basa en primer término en las reflexiones de Francisco Berra, a quien antes hemos mencionado. Se trata de un pedagogo también uruguayo que plasmó su teoría en una obra que había publicado tres años antes que la de Figueira, titulada *Los métodos de lectura*. Berra justifica en ese texto la necesidad de emplear procesos analítico-sintéticos, frente a otros puramente sintéticos o analíticos, haciendo gala de un profundo conocimiento de los métodos de lecturas empleados no solo en su país o en la vecina Argentina, sino también en Estados Unidos, Brasil, Alemania, Italia o Suiza. Su propuesta parte de palabras que él prefiere llamar «generadoras»[17] y que, inmediatamente, se analizan en sílabas y sonidos.

Por otro lado, el método de Figueira se asienta sobre una serie de principios educativos, algunos de los cuales ya circulaban en publicaciones y foros pedagógicos de la época, pero que se pueden encontrar hoy en textos actuales sobre psicología educativa y del aprendizaje. Enumeramos ahora algunos de los principios de Figueira y, a continuación de cada uno, cómo se refiere a ellos, por ejemplo, Omrod[18] en su manual *Aprendizaje humano*.

- «Solo se educa el hombre por lo que él mismo hace. Cuanta más ayuda reciba el niño, tanto menos se educará»[19]. Es decir, para que los alumnos

[14] Figueira, *Instrucciones*, cit.
[15] Figueira, *Paso a paso*, cit., p. VIII.
[16] *Ibid*., p. 30.
[17] Berra, *Los métodos de lectura*, cit., p. 63.
[18] J.E. Omrod, *Human Learning*, 4th ed., Pearson Merrill Prentice Hall, 2004; Trad. esp. *Aprendizaje humano*, Madrid, Pearson, 4ª ed., 2008.
[19] Figueira, *Instrucciones*, cit., p. 9.

aprendan, hace falta que estén «en constante actividad mental mientras se encuentran en el aula»[20].

- «El placer manifestado por el niño indica que la lección se adapta a su naturaleza»[21]. O lo que es lo mismo, se aprende de forma más eficaz y con conductas más productivas si se fomenta la motivación intrínseca[22].

- «No se enseñe más de una dificultad por vez»[23]. Los contenidos tienen que ofrecerse de modo gradual y debe haber, por tanto, un «incremento de la complejidad y diversidad de tareas"[24].

- «Repítase mucho el mismo ejercicio; pero variando lo más posible la forma de presentarlo […]. Así se mantiene la atención; se pone en actividad mayor número de sentidos para un mismo fin»[25]. La variedad y la novedad en la materia y en la forma de presentarla ayuda a mantener la atención y hace que el aprendiz no pierda interés[26].

- «Cerciórese el maestro de que los niños hayan realmente comprendido. […] El dictado y la lectura de palabras nuevas es el mejor medio de verificar las aptitudes adquiridas por los niños»[27]. El diseño apropiado de la evaluación es un elemento fundamental para garantizar el aprendizaje[28].

- «A fin de no perjudicar a la clase por la atención que reclaman uno o dos niños, se les enseñará la dificultad individualmente»[29]. Debe atenderse a la diversidad de situaciones en el aula y, si es preciso, los maestros, «en un momento dado, pueden tener a sus alumnos realizando actividades diferentes»[30]. En este sentido, por cierto, es clarificadora una de las frases que incluye el autor como un aforismo en las páginas previas a la portada de su *Paso a paso*[31]: «La tarea más importante del maestro consiste en individualizar su enseñanza, adaptándola a cada uno de sus alumnos y al tipo medio de su clase».

Estos principios pedagógicos fueron aplicados al hecho lector, sobre el que Figueira había reflexionado largamente. Este autor manifiesta una avanzada concepción acerca de lo que significa leer. Así, en su obra se distingue claramente entre descodificación y comprensión:

> Leer es establecer las relaciones entre el pensamiento, los sonidos que lo representen y los signos que corresponden a esos sonidos. De aquí se infiere que la lectura comprende tres puntos principales: saber el significado de las palabras que se van a leer, poder pronunciarlas

20 Omrod, *Aprendizaje humano*, cit., p. 209.
21 Figueira, *Instrucciones*, cit., p. 8.
22 Omrod, *Aprendizaje humano*, cit., p. 504.
23 Figueira, *Instrucciones*, cit., p. 9.
24 Omrod, *Aprendizaje humano*, cit., p. 456.
25 Figueira, *Ibid*.
26 Omrod, *Aprendizaje humano*, cit., p. 240.
27 Figueira, *Ibid*.
28 Omrod, *Aprendizaje humano*, cit., p. 359.
29 Figueira, *Instrucciones*, cit., p. 10.
30 Omrod, *Aprendizaje humano*, cit., p. 568.
31 Figueira, *Paso a paso*, cit., p. III.

correctamente y tener el hábito necesario para reconocer al golpe de vista la forma en que se escriben dichas palabras. El primero constituye la parte intelectual de la lectura, y los otros la parte mecánica. Ambas hay que atenderlas debidamente; pero en la lectura elemental, la parte mecánica es la que absorbe más tiempo y más fuerzas al niño, y la que más exige una buena graduación, repeticiones frecuentes y mucha variedad en la forma de presentar las dificultades[32].

Además, no se pierde de vista el fin que se persigue con la lectura, que es la comunicación escrita:

El niño que solo se aplica a la lectura de palabras aisladas, difícilmente puede leerlas en proposiciones; por eso desde el primer día puede y debe hacerse que el niño lea frases cortas. […] El estilo adoptado es el de la conversación, que da más naturalidad a la lectura[33].

Figueira demuestra que conoce cómo es la fisiología de la lectura y cómo se accede, desde el punto de vista perceptivo, al elemento escrito. Como es sabido, en la actualidad y a partir del modelo dual de Coltheart, se habla de vías léxica y subléxica[34]. Esta distinción se halla esbozada en el texto siguiente, en el que expresamente se alude a la gran condición para la lectura, una vez interiorizadas las claves del desciframiento, que es el llamado "efecto frecuencia":

Reconocer las relaciones fónicas de los diversos elementos que entran en la composición de un vocablo, debe constituir un hábito de la vista y de los órganos vocales, y esto se obtiene con los ejercicios fonéticos y con los ejercicios continuados de leer las palabras como un todo. Cuanto más se repita la lectura de las palabras y cuanto mayor sea el número de las que se hayan leído, tanto mayor será la habilidad del alumno para leer[35].

Por otro lado, se incide en que la lectura y la escritura no se pueden disociar. Si la concepción de la lectura según este modelo es absolutamente actual, no lo es menos la de la escritura, cuyo valor dista mucho de la simple copia caligráfica:

El mejor medio de conocer los elementos de una palabra no es deletrearla, sino escribirla. Por eso la enseñanza de la ortografía, o sea de la escritura (no se confunda con la caligrafía, que es otra cosa), debe marchar conjuntamente con la lectura. A este fin, se han graduado las palabras de suerte que puedan ser escritas fácilmente por los niños[36].

Compárese el contenido de este breve fragmento con lo que un siglo después escribió sobre lectura y escritura una de las valedoras de las posturas pedagógicas que han contribuido a cambiar los enfoques didácticos en lectoescritura en las últimas décadas del XX: «Son dos actividades diferentes, cada una con sus exigencias y con sus propósitos, aunque muchos maestros suponen que

32 Figueira, *Instrucciones*, cit., p. 6.
33 *Ibid*., p. 7.
34 F. Cuetos Vega, *Psicología de la lectura*, 8ª ed., Madrid, Wolters Kruwer, 2010.
35 Figueira, *Instrucciones*, cit., p. 7.
36 *Ibid*.

al comienzo de la escolaridad los niños solo pueden copiar y, más adelante, podrán escribir. Ahora se sabe que el niño puede escribir aun antes de saber copiar, que la actividad de escribir es diferente de la de copiar»[37]. Es frecuente que los teóricos actuales apelen, con razón, a las aportaciones de Vygotsky sobre el valor de la escritura y lo que él denominaba doble abstracción[38], pero medio siglo antes del psicólogo soviético ya había quienes habían partido de postulados similares.

Por último, el autor justifica los diferentes recursos materiales que se usan en las clases y la necesidad de ofrecer variantes tipográficas: «Para evitar que el niño se habitúe a leer un solo carácter de letra, hemos colocado en el libro las diversas formas más usadas, adoptando la cursiva, generalmente, para los vocablos nuevos de la lección»[39]. Y, a continuación, se describe con todo detalle el uso que tiene que hacerse de los principales instrumentos de enseñanza: la pizarra mural, los carteles, el libro y las pizarritas individuales.

La cartilla Paso a paso

El primer libro que, según la secuencia de Figueira, debe utilizarse en la enseñanza elemental de la lectura es *Paso a paso*. La edición que manejamos ha sido modificada a lo largo de los años, según el autor, a partir de los resultados empíricos que han arrojado diversas pruebas con niños «de condiciones y aptitudes diversas»[40], pero es sustancialmente la misma obra de 1892.

Aunque se trata del primer material que van a tener entre manos los aprendices, ya se apunta, antes de la lección inicial, la conveniencia de que los profesores lean cuentos e historias a los niños que sirvan de preparación: por un lado, los habitúan al maestro y a sus compañeros y, por otro lado, les ayuda a mejorar la expresión y la escucha, pues, como afirma Figueira[41], la lectura «no es más que comprender y expresar lo escrito». En esta misma línea, se aconseja la utilización de los grabados del libro, también como ejercicio previo, para acostumbrar a que los niños progresen en su expresión oral a través de conversaciones, entre los propios niños o entre los niños y el maestro, en torno a las fotografías y dibujos.

Esta concepción del hecho lector que resulta tan actual es la que anima el método. Figueira insiste constantemente en que se evite el error de nombrar las letras, de deletrear, de analizar antes de tiempo… El valor de su propuesta

37 L. Tolchinsky, *Aprendizaje del lenguaje escrito*, Barcelona, Anthropos, 1993, p. 21.

38 L. Vygotsky, *Myshlenie i rech*, Moscú, 1934; Trad. ingl. *Thought and Language*, Cambridge, MA, The MIT Press, 1986.

39 Figueira, *Instrucciones*, cit., p. 8.

40 Figueira, *Paso a paso*, cit., p. VI.

41 *Ibid*., p. VII.

radica en que los aprendices entiendan cómo las palabras constituyen una unidad, aunque estén compuestas de elementos inferiores y esa unidad se asocia a una idea que los niños tienen previamente:

> Cuídese de que los ejercicios de análisis (silabeo y deletreo) no perjudiquen a lectura de las palabras como un todo, y su asociación a las ideas que expresan. Por lo regular, en este año de escuela sólo se analizarán las palabras normales o básicas, para descubrir los elementos a la lectura de las demás palabras: y esto debe hacerse solamente cuando los alumnos sean capaces de leer y escribir dichas palabras normales en su unidad[42].

Para ello se prescribe simultanear, desde el primer momento, lectura y escritura, porque «el conocimiento de la forma de las palabras vigoriza la memoria visual»[43].

A continuación de todas las notas y recomendaciones, comienzan, ya sí, las lecciones, que se estructuran en cuatro bloques:

1. Se parte de palabras guía monosílabas o bisílabas de hasta cuatro letras, de figura y sonido simples, solo con acento llano y compuestas por sílabas directas (C+V: *pala*), o inversas sencillas (V+C: *el*), y se introducen frases que contengan estas palabras y similares, que el autor llama derivadas (no en el sentido morfológico, sino por su parecido grafofonético, como *ajo* con respecto a *ojo*). Se enseña letra *script*, enlazada y mayúscula. Además, se introduce el valor prosódico del punto, la coma y el guion.

La manera de presentar la materia en estas primeras lecciones es la siguiente: en una misma página, en primer término, aparece un dibujo del objeto o realidad a que se refiere la palabra y, debajo, la palabra completa en letra de imprenta; en la parte inferior de la página, la palabra separada por sílabas y, a continuación, esa misma palabra (al comienzo, solo sus vocales) en distintos tipos de letra; finalmente, ejercicios de trazo continuo, relacionados con las letras que se han tratado. La primera palabra generadora que se presenta es *ojo*. En las siguientes páginas, *ala*, *uva*, *nene*, *nido*. Estas seis palabras, que el autor denomina «palabras guías»[44], se recapitulan en dos tablas posteriores: en la primera, figuran escritas con letras de imprenta y enlazada; en la segunda, se descomponen en sílabas y se desarrollan las demás sílabas abiertas que podrían formarse con las consonantes de que se componen estas palabras.

En la página siguiente, Figueira incluye un test de comprobación para que los niños lean y escriban al dictado algunas de las palabras (primera parte) y otras derivadas, como *ola*, *ajo* o *nena* (segunda parte). Esta prueba, según el autor, debe servir para determinar las aptitudes. Se considera que el aprendizaje es correcto si se comete un error por cada tres palabras guía y se deja a criterio del profesor el número de errores que se admiten en las palabras derivadas. En

[42] *Ibid*., p. VIII.
[43] *Ibid*.
[44] *Ibid*., p. 6.

las notas que salpican los pies de página del texto, se incide en la necesidad de enseñar la lectura de palabras como una unidad, sin caer en el silabeo.

Esta es la estructura básica del libro. A partir del test, comienza un segundo bloque, con nuevas palabras guía, pero ahora van apareciendo también frases que las contienen. Figueira tiene previsto, incluso, que deben marcarse más aún la separación gráfica entre algunas palabras para enseñar el ritmo de lectura. Así, en: *Veo a la nena*, para que los niños conciban como una unidad prosódica el grupo *a la nena*. Esto evita vicios de lectura del principiante que se limita a silabear de manera monocorde.

Esta insistencia va de la mano de aquella otra que acabamos de comentar sobre la instrucción en una lectura natural del término completo, que ahora se extiende también a la frase entera: «Los alumnos leerán la frase rápidamente y en su unidad»[45]. Y, unas páginas más adelante: «uniendo las palabras que van unidas por el sentido, como en una buena conversación»[46].

La única variación que se introduce en el tercer grupo de palabras es la descomposición hasta el sonido de las consonantes individuales. El orden de incorporación responde también a un plan: primero las nasales *(m*, *n*, *ñ*), porque su sonido puede prolongarse sin necesidad de que se apoyen en una vocal. Después, oclusivas: *b* y *v*; *d* y *b* (para diferenciar la forma). En tercer lugar, fricativas sordas (*f*, *s*, *j*, *z*), que también «puede prolongarse»[47].

Cada uno de los bloques de palabras guía va seguido de su correspondiente recapitulación en una tabla fonética y de su test de comprobación. El autor considera que la primera parte puede enseñarse completa en tres meses.

2. Las palabras de partida son ahora trisílabas de hasta ocho letras, algunas con acento agudo, y ya se emplean sílabas de tres letras mixtas, como C+V+C (*ventana*); aparecen los dígrafos (*llave*). Se introduce la mayúscula cursiva y los signos de interrogación y el punto y coma. Y todo se practica a través de frases sencillas. Este cuarto grupo de palabras también va seguido de una tabla fonética y de un test de comprobación.

3. Se ejemplifica con palabras polisílabas de hasta nueve letras, algunas con acento esdrújulo; las sílabas son complejas: mixtas dobles, con diptongo, y directas con triptongos, por ejemplo: C+V+V+C (*ciervo*) o C+V+V+V (*buey*). Se enseña el valor de la diéresis y los signos de admiración y de dos puntos. Se practica con frases que contienen este tipo de palabras. Tal como sucede en las partes anteriores, al grupo quinto de palabras le sigue la tabla fonética y el correspondiente test.

4. En el cuarto bloque – en el que no nos detenemos – el autor ofrece una selección de lecturas breves de textos literarios con una finalidad moral.

[45] *Ibid*., p. 11.
[46] *Ibid*., p. 15.
[47] *Ibid*., p. 21.

En cuanto a la vigencia y el alcance de esta obra, el escrutinio en las principales bibliotecas de Argentina y Uruguay arroja como resultado que *Paso a paso*, al igual que el resto de cartillas de la serie, se reeditó muchas veces durante las primeras décadas del XX, al menos hasta 1940, año en que se publica la más reciente de la que tenemos noticia. Figueira se refiere en su libro a la gestión de derechos de autor en América y Europa, y a cómo ha sido imitado el método «en varios países»[48], pero no hemos encontrado evidencias de su uso fuera de Sudamérica. No se ha hallado, por ejemplo, ningún ejemplar en bibliotecas españolas, ni en librerías de viejo.

Sin embargo, varias décadas después, en el año 1987, un autor español, Luis J. Ferreira registró como propiedad intelectual unos materiales para la enseñanza de la lectoescritura, titulados también *Paso a paso*, que guardan una relación – remota, pero evidente – con los del erudito uruguayo. Ferreira[49] afirma en la extensa descripción de su obra que el material de trabajo que propone tuvo su origen en un centro de educación especial catalán, que después se ensayó en una escuela de Tenerife y se fue transformando hasta alcanzar la forma actual. La originalidad de su método radica en el hecho de que es analítico-sintético y de palabras generadoras, cuya secuenciación progresiva coincide a grandes rasgos con la de nuestro autor. Ferreira debió de conocer el *Paso a paso* original a través de Berta Braslavsky, a quien cita varias veces en su texto.

Precisamente esta autora[50], en el marco de un proyecto sobre la historia social de la enseñanza de la lectura en Argentina, contribuyó a revalorizar la producción de Figueira junto con otros textos interesantísimos, como *Anagnosia*, de Marcos Sastre, o *El Nene*, de Andrés Ferreyra, y los relacionó con los esfuerzos reformistas que animaron los planes de estudios elementales en ese país y en su vecina Uruguay hasta la década de los 30 del siglo XX. Estos materiales tienen en común el hecho de focalizar el proceso de enseñanza en la comprensión de palabras y proposiciones, por delante de corrientes fonetistas, basadas en la habilidad para descodificar los grafemas.

Conclusiones

Consideramos que la serie de libros para enseñar a leer de Figueira son particularmente interesantes por cuanto suponen un ejemplo indiscutible de buen hacer pedagógico. Independientemente del número de reediciones de estos

[48] *Ibid*., p. VI.

[49] L.J. Ferreira, *Paso a paso. Material para el aprendizaje de la lecto-escritura. Descripción*, 2014 <http://luisjferreira.es/4-libros-editados/1-paso-a-paso-descripcion-y-recursos> (último acceso: 15.03.2019).

[50] Braslavsky, *Para una historia de la pedagogía de la lectura*, cit.

textos y de la demostración empírica de su eficacia – a la que se refiere el autor –, estos materiales (y, en especial el primero, *Paso a paso*) ofrecen un aprovechable modelo de planificación didáctica, desde muchas perspectivas: temporalización, concepción gradual y lógica del proceso, fundamentos pedagógicos basados en un profundo conocimiento de la psicología infantil, coherencia con respecto a las peculiaridades del código de la lengua que se pretende enseñar, etc.

El recurso a los procesos analíticos y sintéticos, sucesivos pero inmediatos, partiendo del sentido conocido, pero sin descuidar la ejercitación mecánica en la descodificación y el valor fonético de los elementos gráficos, dice mucho de la sabiduría propedéutica del autor. Lo mismo que atender a tantas otras dimensiones implicadas en el complejo hecho lector, algunas tan básicas como los diferentes tipos de letra y otras más intangibles, como la necesidad de que el aprendiz mejore su competencia oral o su conocimiento pragmático del mundo. Se trata de aspectos presentes en las reflexiones que Figueira va vertiendo en su obra y que invitan no solo a su reconocimiento, sino a que se estudie la posibilidad de que sean trasladados a los materiales didácticos actuales.

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Myrtle Shannon v. Herbert King: power, privilege & silence

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ABSTRACT: Myrtle Shannon sued Herbert King, the principal of Kitsilano High School in Vancouver, Canada, for libel and slander in the early 1930s. She claimed wrongful dismissal from her teaching position at the school, and damages for the difficulties she had subsequently in finding another teaching position. Myrtle Shannon's story demonstrates the gendered nature of administrator-teacher relations in the 1930s and the power of principals to remove teachers from their positions. It reveals how the Vancouver School Board and Herbert King used silence to quash Shannon's case, illustrating the use of power in the control of teachers.

EET/TEE KEYWORDS: Teacher-principal relationships; History of education; High School; Canada; 1930s.

In the early twentieth century, British Columbian (BC) teachers suffered job instability as they could be summarily dismissed from their teaching positions by their local school boards without due process, or appeal. Over the 1930s, teachers and the British Columbia's Teachers' Federation (BCTF) worked actively to improve teachers' situations through conferences, recommendations made to the Minister of Education, participation in School Trustee meetings, protests, and legal appeals. These changes went along with small changes to BC Acts that protected workers from wrongful dismissals, as a result of the establishment of a more labor-friendly government and active labor advocacy. Some of the first legislation to protect workers, such as minimum salary scales or the eight-hour working day were made during these turbulent times[1].

[1] J. Naylor, *The British Columbia CCF's working-class moment: Socialism not popularism*, «Labour/le Travail», vol. 71, 2013, pp. 101-121.

Changes to protect teachers from unfair dismissals were made to the School Act over the 1930s. The School Act was revised in order to require school boards to give teachers notice in writing of their dismissal. Other legislative changes made in the 1930s to protect teachers from wrongful dismissal included the addition of the «with cause» clause to the School Act, which required school boards to have a justifiable cause for dismissing teachers. The government also established the Board of Reference to which teachers could appeal if they felt they had been unfairly dismissed. This board included a member of the BCTF. These changes continued over the twentieth century as a result of active BCTF advocacy, slowly leading to the establishment of criteria and due process for teacher dismissals.

When teachers were dismissed at the start of the 1930s, their only recourse was to appeal to the Council of Public Instruction or sue the school board. Myrtle Shannon's case, to be described in this paper illustrates the power of principals to determine teachers' positions and demonstrates why teachers and the BCTF worked to improve teachers' job stability over the decade[2].

Myrtle Shannon

Myrtle Shannon graduated from Chilliwack High School and then from UBC with a Bachelor's degree in 1921. The UBC yearbook stated that she had «eyes with a wondrous, witching charm» and that she enjoyed History and English[3]. She seemed to have been an outgoing student, one who socialized in the library and attended all social functions. She taught as a substitute teacher in 1922 and as a teacher in the interior in 1923. In 1924 she was principal of Grades 2 to 8 in Fruitivale, and the following year she taught high school Latin, French, History, English and drawing in Creston. Her application for a position in Vancouver in 1928 listed her subject areas as History, English, and Latin and noted that she was taking a commercial work certificate. She asked to teach History, as her first option, and then English. She included a table illustrating that her students' exam results were above the provincial average.

Miss Shannon attached a number of reference letters to her application[4]. The first was from her principal. He commented that her work was thorough and that she had good order and discipline in her class. Miss Shannon also

[2] Vancouver School Board, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[3] UBC Yearbook, 1921, p. 24. Retrieved from: <http://www.library.ubc.ca/archives/pdfs/yearbooks/1921_totem.pdf> (last access: 16.09.2019).

[4] Myrtle Shannon's Application package to Kitsilano High School, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

included a January 1925 report on her teaching by the inspector of schools, Sheffield. He marked the tone of her class as «good» her control «good», and her teaching «satisfactory». He added that the, «room creates a fine impression. Grades 8 and 7 are well advanced in the work, but Grade 6 is a backward class. The written work is generally well organized and corrected in detail»[5]. In a second teaching report made on 30 November 1925, the inspector mentioned that, «Miss Shannon was exceedingly nervous on the day of my visit, a fact which accounted to quite an extent for weaknesses in presentation of lessons. I should like to see a better response on the part of the pupils. Lessons especially are much more valuable when pupils respond heartily and freely. Miss Shannon seems to be an exceedingly earnest, hardworking teacher… discipline is good»[6]. In his next report of 4 June 1926, he stated that, «there has been considerable improvement in this teacher's methods and in the progress of classes since my last visit. I was satisfied with the standing of the first and second year classes in French»[7].

A reference letter from UBC professor Eastman written on 11 May 1923 mentioned that Miss Shannon took a university class with him, and that he, «… found her very earnest, industrious and reliable. I should expect her to receive real success in the teaching profession»[8]. A letter from a professor in the Department of English, written on 22 October 1922 noted that, «Miss Shannon has shown herself to be a diligent and faithful student. I am sure she would prove equally painstaking and conscientious in her work as a teacher… Miss Shannon is a young lady of excellent character»[9]. In sum, her references painted a portrait of a sincere, conscientious and hardworking young women who was, like most young teachers, developing her confidence and classroom abilities.

In September 1928, Miss Shannon was offered, and accepted a one-year position at Kitsilano High School[10]. She was one of fourteen new teachers hired

[5] Inspector Report on Shannon, 15 January 1925, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[6] Inspector Report on Shannon, 30 November 1925, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[7] Inspector Report on Shannon, 4 June 4 1926, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[8] Reference letter from professor Eastman for Myrtle Shannon, written on 11 May 1923, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[9] Reference letter for Myrtle Shannon, written on 22 October 1922, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[10] Letter to Myrtle Shannon from the VSB, 22 September 1928, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

Letter to VSB from Myrtle Shannon, 24 September 1928, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

that year, as rising student numbers drove the staff complement from twenty eight to forty two[11].

In the year that Shannon spent at Kitsilano, school inspector Brough evaluated her twice. The first report, dated 3 October 1928, stated that the tone of her room, discipline, and teaching ability-methods were all «good». He wrote that, «Miss Shannon impresses me as a capable young woman, likely to succeed. A number of pupils read well this morning, showing appreciation of the sentiment expressed in the extract»[12]. His next report written on 26 February 1929 was less positive. The tone of the room and discipline were still «good,» but teaching abilities and methods were now categorized as «fair to good.» However, he still portrayed her character and potential positively: «Miss Shannon is anxious to do good work. I have discussed several matters of method with her. Of these she says she will take note. With further experience she should improve»[13]. Like most young teachers, she was viewed to have the potential to improve with practice as her comfort level, knowledge of teaching strategies and confidence were likely to improve with mentoring and time.

Yet the Vancouver School Superintendent informed Miss Shannon on 26 June 1929, «that the Vancouver School Board cannot see its way to re-engage you for the coming school year»[14]. She was not let go for reasons of economy: enrollment at the school had jumped from 1,321 to 1,588 students between 1928 and 1929, and fourteen new teachers raised the teaching staff number to fifty five[15]. It appears that the principal recommended that she not be hired back for the next year. Unfortunately, further, the reasons for her dismissal are unclear: Principal King's letter confirming the dismissal is missing from the archival file, but references to it elsewhere imply that it included negative comments on her teaching. What is clear is that Myrtle Shannon's brother, Wyndon Shannon, a lawyer, wrote to the School Board almost immediately, asking why his sister had been let go, alleging that King's reasons conveyed verbally to Miss Shannon, «seemed so frivolous that it was difficult to understand your acting on same»[16].

11 Vancouver School Board, *Annual Reports, 1928-1929*, Vancouver School Board, Vancouver City Archives, Collection File PDS 19, City of Vancouver.

12 Inspector Brough's Report on Shannon, dated 3 October 1928, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

13 Inspector Brough's Report on Shannon, 26 February 1929, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

14 Letter to Myrtle Shannon from VSB, 26 June 1929, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

15 Vancouver School Board, *Annual Reports*, Vancouver School Board, Vancouver City Archives, Collection File PDS 19, City of Vancouver.

16 Letter to the VSB from W.E. Shannon, 29 June 1929, p. 1, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

And arguing that principal King's decision was motivated by personal prejudice and discrimination[17].

A second letter of 3 July 1929 gave notice that Wyndon was appealing to the Council of Public Instruction[18]. The case was heard in early August and quickly dismissed because Myrtle had been hired on a one-year contract[19]. In the meantime, Wyndon had written to the VSB asking for a «public investigation» into why she had been let go[20]. He maintained that she had done well at other schools and should not be hampered by an unfair, negative and inaccurate record. By this account, when pressed by Miss Shannon about the reasons why she was being let go, King had told her, «finally, when he could find no other reasonable excuse for his recommendation, that he would have no person on his staff whom he did not like, that she would not stay where she was not wanted, and incidentally stated that she could not teach»[21]. The brother implied that the primary reason she was let go was personal and unjust.

A handwritten note on the Board of School Trustees' copy of Wyndon's letter indicated that, in discussion of the case, the superintendent of schools in Victoria felt that Myrtle Shannon had no case against the board because she had been hired for a one year contract. However, if a teacher has taught competently at a school and the school has increasing enrollment, the teacher has a fair expectation of being hired back again. Support for this idea is evident even in the Department of Education, when the Minister of Education stated that teachers should be hired back when possible, if they have been dismissed due to economic challenges, in his reply to a proposal put forward by School Trustees later in the 1930s[22]. On 15 August 1929, the Vancouver Superintendent W S Gordon confirmed the initial decision on Miss Shannon's status[23]. Three months later her brother asked: «what machinery, if any, is provided by the school board for dealing with a situation where it can be shown by a number of disinterested parties that personal prejudice is the foundation of an adverse effect»[24]. Were there, in other words, any checks on the actions of the principal?

[17] Letter to the VSB from W.E. Shannon, 29 June 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[18] Letter to the VSB from W. Shannon, 3 July 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[19] Letter to the VSB from the Board of Education, 12 August 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[20] Letter to the VSB from W. Shannon, 9 August 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[21] Letter to the VSB from W. Shannon, 9 August 1929, p. 2, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[22] BC School Trustees (1936), *Proceedings of the 32nd Convention of the BC School Trustees*. Kelowna Archives.

[23] Letter to W. Shannon from VSB, 15 August 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[24] Letter to VSB from W. Shannon, 19 November 1929, p. 1, *Shannon versus King*, Vancouver

Did the principal act in a fair and impartial manner towards Miss Shannon, or was his decision driven by prejudice, spite, or some other unjust motivation? Why did his decision seem to counter the reports and previous records of the young teacher? If she did need to improve in certain areas of her practice, as do most young teachers, why did Mr. King, who later went on to hold a significant political position as Chief Inspector of Schools in British Columbia, not support her development as a teacher? Were there any checks on the actions of the principal?

The Superintendent replied to Wyndon on 22 November 1929, informing him that they would place the question before the board[25]. On 29 November 1929 Wyndon asked Gordon for a copy of the inspector's reports[26]. Gordon replied in November stating that no reports had been made[27]. (Actually, inspector Brough had made two reports.)

On 18 December 1929 Gordon wrote another letter stating that the complaint had been heard by the School Board and was «ordered filed after suitable acknowledgment»[28]. The board had no interest in addressing the case. The brother and sister were clearly not satisfied with this decision and began to escalate things. Myrtle wrote a letter on 25 August 1930 to inspector Brough asking him for his reports on her[29]. The Superintendent replied to her on 27 August 1930, stating that there was only one report (not true) and refusing to give her the report as, at the time, «inspectors were not required by statute» to give teachers copies[30]. On 7 November 1930, the brother's firm, Caple and Shannon, requested copies of written and oral comments made by King to the board regarding Myrtle Shannon[31].

On 24 November 1930, the School Board's business manager stated that the request had been placed before the board which resolved, «that the letter be acknowledged advising Messrs. Caple & Shannon that it is not considered in the best interests of the board to supply the information requested»[32]. The

city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[25] Letter to W. Shannon from VSB, 22 November 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[26] Letter to VSB from W. Shannon, 29 November 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[27] Letter to W. Shannon from VSB, 29 November 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[28] Letter to W. Shannon from VSB, 18 December 1929, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[29] Letter to Inspector Brough from M. Shannon, 25 August 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[30] Letter to M. Shannon from VSB, 27 August 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[31] Letter to VSB from Caple and Shannon, 7 November 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[32] Memo from the School Board's business manager, 24 November 1930, *Shannon versus*

VSB refused to aid the Shannon's inquiry and withheld information, despite a formal, legal request.

The Shannons were obviously not satisfied with these events. King wrote a letter to Gordon on 8 December 1930 stating that Miss Shannon had issued a writ, «alleging defamation of herself in her capacity of teacher and demands damages in the sum of $2500»[33]. He mentioned that he had retained a lawyer and was under legal counsel not to talk. He argued that the Board had a responsibility to defend him as he was being sued as a result of doing his job.

On 27 December 1930 the City of Vancouver's law department advised the Board not to defend King as the case was personal: the prosecutors wrote that, «that the principal was actuated by ulterior motives and from personal spite» comments that appear to support the Shannon's case[34]. If King was successful, then they would pay his expenses. A news clip from the *Province* on 20 November 1930 was included, with the headline «school principal is sued by teacher»[35]. The case seems to have attracted public interest.

On 19 December 1930, the case information was sent to the city solicitor, and, at the regular board meeting of 16 December 1930, two trustees supported, «that the school board assume his [King's] defense» The note listed all the associated documents and letters. One significant document is missing from the VSB folder: «letter dated June 11th, 1929 from Major H. B. King […] reporting on Miss Shannon and enclosing rating scale card»[36]. King received a summons and was asked to appear before the Supreme Court on 27 October 1931[37].

Shortly after, on 5 November 1931, the VSB secretary was cross examined over two missing documents requested by the prosecutors: «we are quite at a loss to understand why the two documents requested by the Court should be missing from the file. Secretary»[38]. The documents appear to have been the inspector's reports on Miss Shannon, which showed her to have received a

King, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

33 Letter to VSB from King, 8 December 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver. [This was about equivalent to two years of her teaching salary].

34 Letter to VSB from the City of Vancouver's law department, 27 December 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

35 *School Principal is Sued by Teacher*, «Province», 20 November 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

36 Case information letter/memo from VSB to City Solicitor, 19 December 1930, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

37 Supreme Court Summons to King, 27 October 1931, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

38 VSB Secretary Memo, 5 November 1931, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

«good» in most categories. These documents were probably essential to the prosecution as they commented on her teaching ability. It seems that these documents were "misplaced". However, they were in the Vancouver School Board archival file. On 9 November 1931, the VSB secretary wrote a letter to the Province paper stating that the case was on the front page of the paper on Sunday and, «has attracted widespread interest and comment»[39]. He asked the «Province» newspaper to change the comments attributed to the VSB, saying that they had been misquoted.

The documents on Myrtle's teaching ability, which the School Board refused to pass to Myrtle and Wyndon, stymied the Shannon's court cases.

The trials. Technicalities and silence

Myrtle Shannon went to court for «damages for defamation contained in the report to the superintendent of schools»[40]. Myrtle and her lawyer requested permission to question King about the specific comments he had made about her in the report he sent to the Superintendent of Schools and the Board of Trustees. However, the judge stated that she should plead her case. She pled stating that King had written malicious words about her in his reports, although she did not know the exact words stated. This last comment led her to lose her initial case, as it was argued that she could not argue a case of libel if she could not specifically state the words King had written. These may have been contained in the reports that the school board refused to pass to Myrtle and her lawyer.

In the Court of Appeal, on February 11th 1931, Myrtle's lawyer, Montague Caple (her brother's partner), detailed that she had taught at Kitsilano School for one year and was called in to Principal King's office just before the end of school year and told by King, loudly, that he didn't like her, she couldn't teach, and she wouldn't be rehired. Myrtle's lawyer appealed to have the phrase that Myrtle did not know the exact words spoken to be struck out from the statement of claim. He argued that the first judge could have allowed Myrtle to interrogate King. The lawyer for King, Garfield A King, argued that Myrtle did not have a case of libel as she could not state the exact words used by King in his report. One of the Court of Appeal judges, Macdonald, stated that the appeal should be dismissed as the exact words that claimed libel were not stated, that the original judge could have allowed King's interrogation but

[39] Letter to the Province from the VSB secretary, 9 November 1931, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[40] *British Columbia Reports*, Victoria, Law Society of British Columbia, 1932, Vol. XLIV, p. 383. Retrieved from: <http://www.library.ubc.ca/archives/pdfs/bcreports/044.pdf> (last access: 16.09.2019).

didn't. Judge Martin agreed stating that it was "unfortunate" that the words had not been obtained by interrogating King prior to submitting the statement of claim[41]. Judge Galliher also agreed. Judge McPhillips dissented, stating that there should be the possibility of finding out what the words were, as the young teacher, a professional, has had her career affected as she has not been able to find work due to the words spoken by King:

> Is the law so impotent that nothing can be done to effectuate justice? […] In this particular case, I think, of all cases, the Court should not be too vigilant to dispose of the cause of action in this summary way. I certainly am not disposed to at all approve what has been done…It is a reflection on our jurisprudence, that a grievous slander can be perpetrated, and no machinery in our law to ferret out the actual facts and words used….there is the right to submit interrogatories even before the statement of claim is filed, and an order may go for the submission of interrogatories at any later time[42].

In the Spring of that year, Myrtle Shannon and her lawyer were successful in acquiring an order requiring King to be questioned. King answered some questions on 15 April 1931. However, King's answers did not provide Myrtle with the evidence she needed to be able to proceed with her libel case and so she got an order for a supreme court judge to interrogate King verbally on 22 April 1931. King appealed the order at the Appeal Court on 6 October 1931. King's lawyer (G. King) argued that King had given sufficient answers and that the order was for "fishing" purposes only. Myrtle Shannon's new lawyer (Sloan) argued that the appeal court should not interfere in this order. The Court of Appeal judge, McDonald once again took the side of King, arguing that he was not satisfied that libelous words had been spoken. Judge Martin stated the appeal should be dismissed as he believed no evidence had been presented to overrule the first judge's order. Judge McPhillips sided with Myrtle again stating:

> The plaintiff is a young lady of admitted high character the holder of an academic teaching certificate issued by the Province of British Columbia Education Department in 1922, a teacher of experience…I cannot help expressing my sympathy for the young lady the plaintiff in the action. It is evident that she discharged her duties in schools of the Province with acceptation over a considerable time but in the end there comes a time when the school authorities take a stand against her and she is – without cause given – denied employment and that is the present day position. I cannot say that is reflects any honor or credit upon a system so materially supported by the Government of the Province. Everyone is entitled to be heard in his own cause. That is natural justice; here it apparently has been denied […] To me the position seems inexplicable and reflects little honor upon the school authorities of the Province. Why this secretiveness? I may say that the learned counsel for the defendant gallantly admitted that nothing could be said against the plaintiff, then why this suggested message that has gone out to the schools authorities of the Province that she shall be denied employment?[43]

41 *Ibid*., p. 386.
42 *Ibid*., pp. 388-389.
43 *Ibid*., p. 389.

The appeal was dismissed: the judge's order for further verbal questioning of King was upheld.

However, on 11 January 1932, Myrtle Shannon applied to discontinue her case without paying costs. Her order was granted. It seems that Myrtle ran out of money to be able to continue the case. This is not surprising as it was now the Great Depression, and the court case had made clear that she had not been able to find further teaching work in the province due to the comments made by King.

The denouement

On 21 January 1932 King wrote to the secretary of the VSB asking the board to cover his legal fees of $ 1,732.91 (the equivalent of about one year's salary), and stating that, «the litigation has been discontinued and abandoned by the plaintiff for the second time. The proceedings have involved two successive actions in the Supreme Court and two appeals to the Court of Appeal»[44]. The letter included a note stating that the Board declined to give the principal's report (presumably to the Shannons), as they believed that principals should be able to make fair reports and should not be subject to pressure to change their opinions[45]. Thus, the school authorities sided with the principal arguing that principals had the right to make their reports on teachers, without any acknowledgement of the need for due process in dismissal processes, or any apparent concerns about whether the principal's actions should be subject to checks and balances. At first, the board wanted to deny King's claim and file his letter, the secretary wrote to King in January 1932[46]. King's lawyer then wrote to the city councilor later that month stating that it was morally right for the Board to pay as it was understood that, «if, in the outcome, no libel or slander were shown, it would be a proper case for the Board to pay the defendant's costs»[47]. The city councilor then wrote to the VSB stating that they

[44] Letter to the VSB from King, 21 January 1932, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[45] VSB memo attached to the letter, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[46] Letter to King from the VSB secretary, January 1932, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[47] Letter to the city councilor from King's lawyer, 27 January 1932, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

should pay and, «that the Plaintiff never had a cause of action and had to finally discontinue the proceedings because she was unable to state a cause of action. The action never came to trial»[48]. After some negotiation over which costs could be covered, the board finally agreed to pay King $227.50.

Myrtle Shannon's Later Life

The court evidence described above states that Myrtle Shannon had trouble finding a teaching position after King's negative reports on her. Later on, Myrtle moved to Ottawa and went to work for National Employment Services in Ottawa. Myrtle died in an Ottawa hospital in 1971[49]. Prior to discussing the case between Myrtle and King, some of Dr. King's correspondence as Chief Inspector of Schools will be reviewed in order to get a sense of the man.

Herbert King

King was born in Ontario in 1879. He received a BA from Queens University in 1913, an MA from UBC in 1923 and a PhD from the University of Washington in 1936, for which he wrote about how to finance education in BC. He fought in World War I, achieving the rank of Mayor. He began to teach in Vancouver in 1904 and was the principal of Kitsilano School between 1925 and 1934. He also taught at UBC at this time where he befriended Dr. Weir, who became Minister of Education in 1934. Weir appointed King technical advisor to the School Finance commission. He wrote its report recommending small school district consolidation. Its findings were not implemented due to opposition. In 1937, Weir appointed King Chief Inspector of Schools. King led a major curriculum revision later in the 1930s, for which he articulated a progressivist educational vision. King was described as practicing an «authoritarian, scientific style of instruction» and as «impatient» «uncompromising», and «autocratic»[50] After retiring in 1945, he wrote a book and newspaper articles. In died in 1956, while on a visit to Ottawa with his daughter.

[48] Letter to the VSB from The city councilor, January 1932, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[49] Shannon, *Myrtle obituary*, «The Ottawa Journal», March 5th 1971, p. 30.

[50] *Ibid*.

Dr. King's Correspondence

A miscellaneous collection of letters sent by King across the province during his time as Chief Inspector of Schools illustrate some of the concerns and issues related to teaching in the late 1930s[51]. He received letters asking for books, teaching aids from the United States (on a series of books on topics for "slow learners", health education and correspondence) and recommendations for assessment.

Dr. King was asked for advice on how to how measure student achievement on tests properly and how to design an achievement test, to which he replied that the test should have sufficient test items to effectively test students, and that the questions should be answered correctly by half of the students. The questions were to be organized by difficulty and given to «as many grade III and VI pupils as you can lay your hands on»[52]. King recommended that the tests be marked and that students then be arranged by their marks, notwithstanding their grade levels. The examiner, Dr. King stated, would be able to determine the difficulty of each question based on how students answered it and select questions that identified «good» and «poor pupils»[53]. King also shared an "aptitude"– intelligence test which «measures the student's present status with respect to capacity for school learning» on 19 October 1939[54].

One letter is insightful. In a reply to a letter stating that teachers were not allowed to express their opinions, King stated: «The Department of Education does not employ the instrument of fear and coercion. Teachers are not prohibited in any way from expressing their opinion upon education, though it is expected that persons will do so with appropriate language and weight based on factors such as intelligence»[55]. He stated that teachers needed to be open minded and continue to grow.

King's correspondence illustrates him to be an educational "expert"[56] embedded in contemporary thought of his time, particularly social efficiency conceptions of schooling. His advice focused on testing using rationalized, and "scientific" approaches and he made reference to American work.

51 H. King, *Correspondence outward*, British Columbia Archives, 1938-1939, GR-0452.

52 Id., *Aptitude Test*, British Columbia Archives, 19 October 1939, GR-0452.

53 Id., *Correspondence to Mr. Joseph Hammett*, British Columbia Archives, 25 October 1939, GR-0452.

54 Id., *Aptitude Test*, cit.

55 Id., *Teacher criticism*, British Columbia Archives, 11 October 1939, GR-0452, p. 2.

56 R.C. Harris, *Locating the University of British Columbia*, «BC Studies», vol. 32, 1976-1977, pp. 112-115; D. Owram, *The government generation: Canadian intellectuals and the state, 1900-1945*, Toronto, University of Toronto Press, 1986.

Discussion

Three major themes to emerge from Myrtle's story are discussed next.

Principal Power

Principal King had power to judge the teaching performance of Myrtle Shannon at the school. His written report on Myrtle (which was never "found" for the trial) resulted in her receiving a letter stating that she would not be hired back the next year, despite the reasonable assessments made of Myrtle by the school inspector and her previously good reports and character references. In 1933, a School Act change established a new Board of Reference, which allowed teachers to appeal their dismissals[57]. Myrtle's case is one of dismissal as the school was increasing its teaching numbers, and teachers who are hired on term bases can expect to be hired back if they do their work competently. In this case, principal King decided not to rehire Myrtle back again for the next school year based on criteria that are not clear and which could have been based on personal prejudice. No one else in the educational administration "checked" on the actions of principal King, thus, King acted as he saw fit without accountability.

The newly established Board of Reference included a member of the British Columbia Teachers' Federation (BCTF). The BCTF seems to be have been involved in setting up the Board of Reference[58]. Myrtle's case demonstrates that principals could easily lay off a teacher, without any due process at the school level. Myrtle heard, only a few days before she received the dismissal letter, that she would not be hired back in the next year. The establishment of the Board of Reference aimed to ensure due process in teacher dismissals, particularly during the Great Depression. As Judge McPhillips stated, it was justice that Myrtle's side be heard, and it didn't reflect well on the school authorities that this was not the case. It appears, as Wotherspoon argued, that school administrators and government officials acted in collusion to protect their own interests[59].

Further, Principal King was allegedly not very professional in the manner with which he dismissed Myrtle. King was known to be firm in his behavior

[57] Committee of Council, Bill 17, *An Act to amend the Public Schools Act*, 1933. Retrieved from: <http://www.bclaws.ca/civix/document/id/arch_oic/arc_oic/0246_1933> (last access: 08.06.2016).

[58] British Columbia Federation of Teachers, *History of the BCTF*. Retrieved from: <https://bctf.ca/uploadedFiles/About_Us/HistorySummary.pdf> (last access: 16.09.2019).

[59] T. Wotherspoon, *Occupational Divisions and Struggles for Unity Among British Columbia's Public School Teachers*, «BC Studies», vol. 107, Autumn 1995, pp. 30-59.

and overbearing[60]. By taking King to court, Myrtle was obviously affected by King's actions and words. How often did principals treat teachers poorly in the 1930s, particularly as their power was unchecked? Blase describes cases of principal mistreatment of teachers in the United States today and explores their negative effects on teachers[61]. Research has also explored how differing principal leadership styles affect new teachers' induction into schools, and the effects of differing leadership styles and morale[62]. Some principals are effective in mentoring new teachers; others aren't based on their views of leadership and background. According to one biography, King was a progressivist, a movement that supports mentoring students' growth[63]. Why didn't he follow this practice with Myrtle? King went on to become the Chief Inspector of School as a result of his friendship with Minister Weir. His career does not appear to have been affected by the trials, except for some out of pocket expenses. Myrtle Shannon ended up in another career across the nation.

Lack of Transparency

Despite repeated requests and court orders, the board refused to pass key documents to the lawyers. There was a note contained in the archival file that these documents were not passed over, as principals should be free to make the statements they feel are needed on teachers[64]. Thus, the board sided with King, even to the point of stating that they didn't have particular documents necessary to the case (the inspectors reports on Myrtle which were found in the archival file, and the report of Principal King on Myrtle, which was missing from the file). The board's implicit support of King seems to support Wotherspoon's argument that school administrators colluded with each other and government officials to protect their interests[65]. Further, this was a gendered affair as teachers

[60] J. Wytenbroek, *Herbert Baxter King 1879-1956. Soldier, teacher, civil servant, and school administrator*, 2003. Retrieved from: <https://www2.viu.ca/homeroom/content/topics/people/king.htm> (last access: 16.09.2019).

[61] J. Blase, *School principal mistreatment of teachers: Teachers ' perspectives on emotional abuse*, «Journal of Emotional Abuse», vol. 4, n. 3-4, 2004, pp. 151-175.

[62] H. Hunter-Boykin, *The relationship between high school principals' leadership and teachers' morale*, «Journal of Instructional Psychology», vol. 22, no. 2, 1995, pp. 152-163.

[63] J. Wytenbroek, *Herbert Baxter King 1879-1956. Soldier, teacher, civil servant, and school administrator,* 2003. Retrieved from: <https://www2.viu.ca/homeroom/content/topics/people/king.htm> (last access: 16.09.2019).

[64] VSB memo attached to Letter to the VSB from King, 21 January 1932, *Shannon versus King*, Vancouver city archives, Board of School Trustees series, D - 4 vol. 1, location 58-B 6, File 9, City of Vancouver.

[65] Wotherspoon, *Occupational Divisions and Struggles for Unity Among British Columbia's Public School Teachers*, cit., pp. 30-59.

were largely females, particularly young, unmarried girls, and principals were often males. Female teachers were treated unequally when compared to their male colleagues[66].

Silence

Principal King used silence in the trials to prevent the case from moving forward. His report was never turned over to the lawyers despite their orders. He also prevented the case from moving forward by refusing to share his assessment of Myrtle in court. Myrtle was successful in getting an order for King to fill out interrogatories, but he answered the questions in such a manner that Myrtle could not move the trial forward. She received another order to have King orally questioned by a judge. King appealed the order and lost. Thus, we have to assume that Myrtle's next actions in court would have been to be get King questioned orally in court. However, Myrtle stopped her case a few months after the appeal. It seems that she ran out of money, which is not surprising as it was now the height of the Great Depression and evidence in the court stated that she hadn't been able to find work as a result of King's negative comments. King's strategy of refusing to share his assessment of Myrtle was effective in preventing him from being sued for libel and slander. Why did he refuse to share this report? His refusal to share it seems to imply that he didn't feel comfortable sharing the assessment he had made of Myrtle. Perhaps he felt that it could have been used against him in court.

Conclusion

This article has described Myrtle Shannon's legal case against her principal. Myrtle was a young teacher who lost her job due to her principal's poor evaluation of her. We only know Myrtle's story as she went to court. How many other, unknown teachers lost their jobs due to the principal's unrestricted power to judge their fitness to teach? How many of these principals' assessments were accurate? How many were unfair? Why did the school board support the principal in the case?

66 C. Ogren, *A large measure of self-control and personal power*, «Women's Studies Quarterly», vol. 28, no. 3-4, pp. 211-233.

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«Debemos considerar al marido como nuestro señor». El ideal de la perfecta esposa en los teatros de papel de Seix i Barral (1915-1953)*

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«We must consider our husband as our master». The archetype of the perfect wife in toy theatres of Seix and Barral (1915-1953)

ABSTRACT: The subordination of women to men has been the historical basis for the division of spaces and functions between men and women. From the time they were born, boys and girls were brought up in this reality, materializing gender differences in their daily lives in very different ways. The teaching of reading and writing has been used by all societies for the transmission of certain values and ideologies, where gender differences have also always been present. A reflection of this can be found in paper theaters, a toy conceived as an entertainment instrument as well as a useful didactic tool to transmit to childhood the prevailing female stereotypes in the society of the moment, in order to perpetuate and consolidate the model of conventional woman inherited from centuries ago: that of the perfect wife.

EET/TEE KEYWORDS: Children's and youth spanish literature; Toy theatres; Gender stereotypes; Spain; XXth Century.

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1. *De los dioramas de Martín Englebercht al Teatro de los Niños de Seix i Barral*

Los teatros de papel son pequeñas cajas llenas de magia y de sueños que despiertan la imaginación tanto de pequeños como de mayores. En ellas se esconden historias de monstruos, héroes, príncipes y princesas, de sapos, hadas o brujas, que los lectores-actores-espectadores debían descubrir, y con las que no solo pasaban el tiempo, puesto que cada historia, además de entretener, enseñaba y transmitía unos determinados valores e ideologías como el amor a la patria, el culto a dios o, por ejemplo, la división sexuada del mundo. La lectura de estas obras de teatro infantil se convertía así en una forma más de aprender y de jugar al mismo tiempo, como sucedía con tantos otros juguetes pedagógicos de la época.

Aunque podríamos remontar el origen de los teatros de papel hasta la Prehistoria, con aquella fascinación que los primeros homínidos debieron sentir al observar las sombras que sus cuerpos creaban en las paredes de las cuevas donde vivían gracias al fuego, lo cierto es que no fue hasta el siglo XVIII cuando aparecieron los primeros teatros de papel como tal. Sí podemos, sin embargo, considerar como sus remotos precursores a los teatros de sombras del antiguo Egipto, Grecia o Roma[1], o, más cerca en el tiempo, a los famosos títeres y marionetas[2]. Pero no fue hasta mediados del siglo XVIII cuando tuvo lugar la creación de la primera caja escénica de papel. Fue el impresor alemán Martín Englebrecht quien inventó lo que un siglo más tarde vendría a denominarse «diorama», es decir, «paisajes o escenas en tres dimensiones, creados mediante figuras y decorados que se colocan en diferentes planos, creando así la sensación de profundidad»[3], siendo habitualmente su temática de tipo bíblica[4]. Estos dioramas eran grabados al buril sobre cobre y las ilustraciones que en ellos aparecían solían ser del dibujante Jeremias Wachsmuth (1711-1771)[5].

Con el tiempo, el diorama se consolidó y difundió en la Inglaterra victoriana como producto de entretenimiento entre los jóvenes burgueses, adoptando el

[1] De hecho, hoy en día los teatros de sombras o sombras chinescas siguen siendo muy populares en toda Indonesia, especialmente en Tailandia, la India, China y Japón.

[2] Algunos autores se han servido de este juguete para reflexionar acerca del hombre, como el filósofo Platón en su célebre mito de la caverna, o como el escritor Calderón de la Barca en su obra *El Gran Teatro del Mundo*. J. Cervera, *Teatro y educación*, Barcelona, Ediciones Don Bosco, 1982, p. 11.

[3] L. Contreras Flores, *Colección Lucía Contreras Flores. Teatros de papel*, Casa de los Títeres, Abizanda, Huesca, 2007, p. 11.

[4] El Museu Frederic Marès de Barcelona conserva una importante colección de estos dioramas de Martin Englebercht, de los cuales hay siete expuestos al público: una escena cortesana y seis escenas bíblicas, concretamente, Adán y Eva en el Paraíso, el Arca de Noé, las Bodas de Canaán, la Matanza de los Inocentes, la Flagelación de Cristo y el Calvario. Sobre este museo, véase P. Vélez (dir.), *Museu Frederic Marès. Guía*, Ajuntament de Barcelona, Institut de Cultura, 2011.

[5] *Ibid*., p. 225.

nombre de teatros de papel y estando al alcance de unos pocos que lo adquirían más como objeto de coleccionismo que como producto de entretenimiento. Parece ser que los teatros ingleses empezaron entonces a vender a los espectadores, junto al programa de la obra, distintas estampas ilustradas donde aparecían los actores de moda representando a sus respectivos personajes con fines claramente publicitarios. Dichas estampas se convirtieron enseguida en recuerdos de lujo entre las clases media y alta inglesas que, fascinada por su belleza, comenzaron a coleccionarlas e intercambiarlas[6].

Sin embargo, lo que empezó siendo un objeto exclusivo acabó convirtiéndose con el tiempo en un elemento de ocio cotidiano para los hijos e hijas de la incipiente burguesía. El rápido éxito que estas estampas adquirieron entre los niños y jóvenes ingleses llevó al impresor inglés William West a crear la primera colección de tetros de papel. El *Peasant boy* fue el primer teatro de papel completo, compuesto ya de escenario, bastidores, personajes y libreto. A William West le siguió John Kilby Green, quien puso a la venta los *Halfpenny editors* o editores de medio penique, teatros de papel al alcance de todos debido a sus precios más competitivos. La bajada de la calidad permitió el abaratamiento de los productos, lo que permitió que los teatros de papel de John Kilby Green empezaran a popularizarse entre las clases más humildes.

Ya a caballo entre el siglo XIX y el siglo XX, apareció en escena el que sería el gran protagonista de los teatros de papel ingleses: Benjamin Pollock. Los Pollock fueron los principales productores y vendedores de teatros de papel en Londres, destacando sus «modelos victorianos con decorados y personajes pintados a mano y con un sistema eléctrico de iluminación [en el que] los personajes se introducen en unas pinzas metálicas que son a la vez varillas de manipulación»[7]. El éxito de los Pollock hizo llegar los teatros de papel a todo el mundo y hoy, el *Pollocks Toy Museum* de Londres conserva y recuerda la importante tradición de los *toy theatres* en Inglaterra[8].

La aparición de los teatros de papel en otros países europeos siguió un recorrido muy diferente al inglés, pero siempre bajo la estela de éste como modelo, como sucedió en Alemania[9], Austria[10] o Dinamarca. Por su parte, las producciones

[6] Id., *L'edició de teatres de paper: dels diorames d'Engelbrecht als teatres cromolitogràfics*, en Id. (coord.), *Teatres de joguina. De l'entreteniment al col·leccionisme. Catalunya, segles XIX-XX*, Barcelona, Quaderns del Museu Frederic Màres, n. 11, 2005-2006, pp. 137-157.

[7] L. Contreras Flores, *Colección Lucía Contreras Flores. Teatros de papel*, Casa de los Títeres, Abizanda, Huesca, 2007, p. 18.

[8] Para saber más sobre el mundo del teatro de papel inglés, véase G. Speaight, *The History of the english Toy Theatre*, Londres, Studion Vista, 1946.

[9] El mayor productor de teatros de papel en Alemania fue Shreiber, cuya empresa siguió activa hasta la Segunda Guerra Mundial y en la actualidad es una importante editorial que recientemente ha reeditado alguno de sus primeros teatros de papel.

[10] El enorme éxito alcanzado por las producciones de los austriacos Mathias Trentsensky y Theodor Jachimovicz hizo que sus teatros de papel llegaran incluso al elitista mercado del coleccionismo inglés, equiparándose así a los célebres teatros de papel Pollocks.

francesas realizadas en Epinal ocuparon un lugar especial en el mundo del teatro de papel. En 1796, Jean Charles Pellerin abría la *Imaginerie d'Epinal*, dedicada a la venta de estampas costumbristas destinadas a ser recortadas y pegadas sobre un cartón. Editores posteriores, como Charles Pinot, fundador de la *Nouvelle Imaginerie d'Epinal*, transformaron este concepto incorporando la producción de teatros de papel a sus negocios. Fue precisamente Pinot quien ideó el primer teatro de papel francés que representaba al Teatro de la Ópera de París. La fama de la empresa de Pellerin duraría hasta 1906, año en que la *Imaginerie Pellerin d'Epinal* cerró sus puertas al público.

Muchos otros países produjeron y comercializaron teatros de papel a lo largo de los siglos XIX y XX, como Italia, Holanda, Noruega o Rusia. En Estados Unidos también llegaron a editarse algunos teatros de papel, aunque nunca alcanzaron los niveles de popularidad que tuvieron en Europa. Aun así, incluso la internacionalmente conocida empresa de dibujos animados Walt Disney llegó a editar algunos teatros de juguete, como el *Teatro de Blancanieves*, donde la célebre historia de la joven y los siete enanitos fue presentada con el mismo sistema de montaje utilizado por los Pollocks en Inglaterra[11].

La llegada de los teatros de papel a nuestro país se produjo con un cierto retraso temporal con respecto al resto de Europa y lo hizo, en todos los casos, a través de Cataluña[12]. Aunque antes hubo otros editores de teatros de papel, como Joan Llorens o Antoni Bosch[13], ninguno de ellos es comparable en su volumen de producción ni en su calidad a las editoriales Paluzie y Seix i Barral, protagonistas indiscutibles de la edición de teatros de papel en Cataluña en las últimas décadas del siglo XIX y la primera mitad del siglo XX respectivamente.

En 1865, el prestigioso editor y pedagogo Esteve Paluzie decidió crear la *Estampería Económica Paluzie Imprenta Elzevirana*[14] con el fin de editar láminas de papel para recortar con un marcado acento catalán que vinieron a representar la realidad de la burguesía catalana de la época[15]. Estas láminas estaban totalmente bajo la influencia de la por aquel entonces ya célebre

[11] Para saber más acerca de la expansión por el mundo del teatro de papel véase P. Baldwin, *Toy theatres of the wold*, Londres, Zwemmer, 1992.

[12] Hasta la fecha, apenas existen estudios sobre este juguete en España. Basta con mirar algunas de los principales trabajos sobre la historia del juguete en España para comprobar la escasa atención que este producto ha recibido por parte de los especialistas: F. Díaz Plaja, *Apuntes para una historia del juguete*, Barcelona, Bruguera, 1984; y J. Corredor-Matheos, *El juguete en España*, Madrid, Espasa-Calpe, 1999. Las únicas obras que abordan la historia de los teatros de papel en España proceden de los coleccionistas Francesc d'Assís López Sala y Lucía Contreras Flores.

[13] Sobre las editoriales barcelonesas Joan Llorens y Antoni Bosch, véase F. López Sala, *Primera aproximació a la historia dels teatres de paper a Catalunya*, en Vélez (coord.), *Teatres de joguina. De l'entreteniment al col·leccionisme. Catalunya, segles XIX-XX*, cit., pp. 29-34.

[14] A lo largo de sus casi ochenta años en activo, desde 1865 hasta 1939, esta editorial sufrió numerosos cambios de nombre, por lo que se pueden encontrar diferentes referencias a la misma en función de cada momento, aunque el más conocido es Estampería Económica Paluzie.

[15] L. Contreras Flores, *Colección Lucía Contreras Flores. Teatros de papel*, Casa de los Títeres. Abizanda, Huesca, 2007, p. 23.

Imaginerie Pellerin d'Epinal, aunque también se aproximan a las producciones de la editorial alemana Shreiber[16]. Las láminas de Paluzie se caracterizaban por no representar una obra concreta[17], sino que se trataba de hojas de teatro con escenas variadas intercambiables hechas casi siempre bajo la técnica de la litografía[18].

Sin duda, las láminas de Paluzie fueron el arranque perfecto de la producción de los teatros de papel en Cataluña. Con la llegada de la nueva centuria, otras editoriales fueron tomando el relevo, siendo sin duda la editorial barcelonesa Industrias Gráficas Seix i Barral con su colección del *Teatro de los Niños* la que controlaría por completo el mercado de los teatros de papel en España. Es precisamente de esta colección de la que proceden las tres historias seleccionadas para analizar la transmisión del estereotipo de la perfecta esposa que realizaremos más adelante: *El alma de las ruinas*, *La esposa desconsolada* y *La fierecilla domada*.

2. *El Teatro de los Niños de Seix i Barral*

En 1911 se funda en Barcelona la editorial Industrias Gráficas Seix i Barral S.A. Esta empresa, que existió hasta su adhesión al Grupo Planeta en el año 1982[19], surge como fruto de la fusión de la Tipolitografía Seix y Cia., liderada por los hermanos Carles y Lluís Seix, y de la empresa Barral Herms., dirigida por Francesc Seix Faya. Cuatro años después, y bajo la patente C. B. Nualart[20], sacaban a la venta la primera tirada de obras del *Teatro de los Niños*, una colección de teatro infantil en papel que fue editada hasta 1953 y que estaba llamada a ser todo un éxito de ventas entre el público infantil español, y especialmente catalán, de la primera mitad del siglo XX. A 2 pesetas sin recortar o a 3 pesetas ya recortadas, Seix i Barral puso al alcance de todos los públicos,

16 M. Casas Correa, *Teatros de papel 1765-1860. ¿Construcción de un modelo a la francesa?*, «Revista de arquitectura», n. 17, 2015, pp. 18-31.

17 A excepción del *Don Juan Tenorio* de Zorrilla y de las obras de magia *La pata de cabra* de Grimaldi y *La redoma* encantada de Hartzensbuch. López Sala, *Primera aproximació a la historia dels teatres de paper a Catalunya*, cit., p. 37.

18 Para saber más sobre esta editorial, véase J. Torres i Ramos, *L'Estamperia Econòmica Paluzie i els seus retallables*, Barcelona, (estudio inédito), 1989; y López Sala, *Primera aproximació a la historia dels teatres de paper a Catalunya*, cit., pp. 35-58.

19 A partir de los años 60, el Grupo Planeta compró numerosas editoriales, entre las que se encontraba Seix i Barral, que desde ese momento pasó a formar parte del gigante editorial español. Sobre la historia del Grupo Planeta, véase X. Moret, *Tiempo de editores. Historia de la edición en España, 1939-1975*, Barcelona, Ediciones Destino, 2002, pp. 120-136.

20 La patente escondía el nombre del padre de los fundadores de la empresa e inventor de la colección del *Teatro de los Niños*, Carles Barral i Nualart, quien escribió y adaptó la mayoría de las obras. López Sala, *Primera aproximació a la historia dels teatres de paper a Catalunya*, cit., p. 59.

con independencia de su nivel social, un juguete pedagógico que es realmente ahora con el *Teatro de los Niños* cuando se democratiza y, en consecuencia, populariza entre el público infantil español. Su éxito la hizo incluso ganadora del Premio de Fomento de las Artes Decorativas de la III Exposición de Juguetes celebrada en Barcelona en junio de 1917 por ser «la joguina que, a judici del jurat, reuneixi més condicions artístiques».

Para poder jugar a este «medio de inagotable entretenimiento», como indica la publicidad de la marca, lo primero que el niño o niña debía tener era un proscenio, es decir, la estructura base del teatro. Ésta se adquiría por separado a las obras y su precio oscilaba entre las 10 y las 30 pesetas, según el catálogo de la marca de 1918. En los 38 años que estuvo a la venta el *Teatro de los Niños*, Seix i Barral editó un total de 10 proscenios: el *Modelo B*, el *Modelo especial de lujo BB* (conocido como «el de las velas») y el *Modelo CC* en 1915; el *Modelo M* (conocido como «el de las columnas») en 1918, el *Modelo D* y el *Modelo E* en 1935; el *Modelo S* en 1949, el *Modelo S/N* (conocido como «el de los angelitos») en 1951, y el *Modelo H* (conocido como «el de las cortinas») y el *Modelo B* (conocido como «el de los monigotes») en 1953[21].

Esta estructura base servía para el total de las 23 obras que puso a la venta la editorial barcelonesa[22], de modo que se podía jugar con multitud de teatros de papel diferentes con historias, escenarios y personajes distintos en un mismo y único proscenio. La estructura, imitando la de un teatro real, estaba compuesta por el bastidor, la embocadura, el escenario y el telón de boca[23], y se vendían dentro de un sobre – a un precio más barato – o dentro de una gran caja – más cara – que hoy en día es una preciada pieza de coleccionistas.

Una vez comprado el proscenio, ya se podía jugar con cualquiera de sus obras. Cada uno de estos teatritos se vendía dentro de un gran sobre dónde estaban todos los elementos necesarios para montar la obra y empezar a jugar. Dicho sobre, de un color diferente en función de las obras, tenía unas dimensiones de 36 x 26 centímetros y en él aparecía el logo y nombre de la empresa, así como el de la correspondiente obra de teatro que contenía. En el interior del sobre

[21] *Ibid*., pp. 64-71.

[22] Además de esas 23 obras, en la publicidad de la editorial había otros seis títulos que no llegaron a editarse: *El Herrero*, *El Capitán pirata*, *La Flauta Mágica*, *Maese Nicolás*, *Antígona de Sófocles* y *La tempestad*.

[23] Según el *Diccionario de la lengua española*, bastidor: «armazón de listones o maderos, sobre el cual se extiende y fija un lienzo o papel pintados, y especialmente, cada uno de los que, dando frente al público, se ponen a un lado y otro del escenario y forman parte de la decoración teatral»; embocadura: «en los teatros, marco por cuyo hueco se ve la escena cuando el telón se alza y puede ser doble; el segundo marco suele ser de amplitud regulable»; escenario: «parte del teatro construida y dispuesta convenientemente para que en ella se puedan colocar las decoraciones y representar las obras dramáticas o cualquier otro espectáculo teatral»; telón de boca: «telón que cierra la embocadura del escenario y está echado antes de que empiece la función teatral y durante los entreactos e intermedios». *Diccionario de la lengua española*, edición del tricentenario, Real Academia Española, actualización de 2018. (https://dle.rae.es/?id=DgIqVCc). Fecha de consulta: 30 de mayo de 2019).

estaban las diferentes láminas con los decorados, los personajes listos para ser recortados y dos ejemplares de los libretos con el texto. Cada obra podía tener entre siete y diez decorados para los dos actos que componían cada historia[24]. Todos ellos iban numerados del 1 al 19, de modo que fuera sencillo saber la posición del bastidor en que debía ser colocado y el acto al que correspondía en cada caso. La cromolitografía de los decorados estaba realizada en cartulina y cartón de 21 x 30 centímetros y podía ser de fondo opaco, de láminas de papel glassine o con aberturas que permitieran ver el resto de los decorados.

Con todos los materiales dentro, lo único necesario era saber montar el teatro en miniatura y para ello había unas detalladas instrucciones de montaje en la parte posterior del sobre. Lo primero que los niños y niñas tenían que hacer era colocar los decorados en una de las 19 posiciones posibles y repartidas entre el primer y el segundo telar en función del acto al que correspondían. Colocados los telones, llegaba el turno de los personajes que, tras haber sido cuidadosamente recortados de la lámina, debían pegarse en una tira de cartón de 25 milímetros de ancho por 330 de largo según las indicaciones de la marca. Dado lo entretenido y delicado del proceso, la editorial Seix i Barral ofrecía la opción de comprar una *Montura Universal para personajes* que permitía «montarlos sin ninguna pegadura y, por consiguiente, guardarlos en un sobre después de la representación, coleccionándolos con las decoraciones»[25].

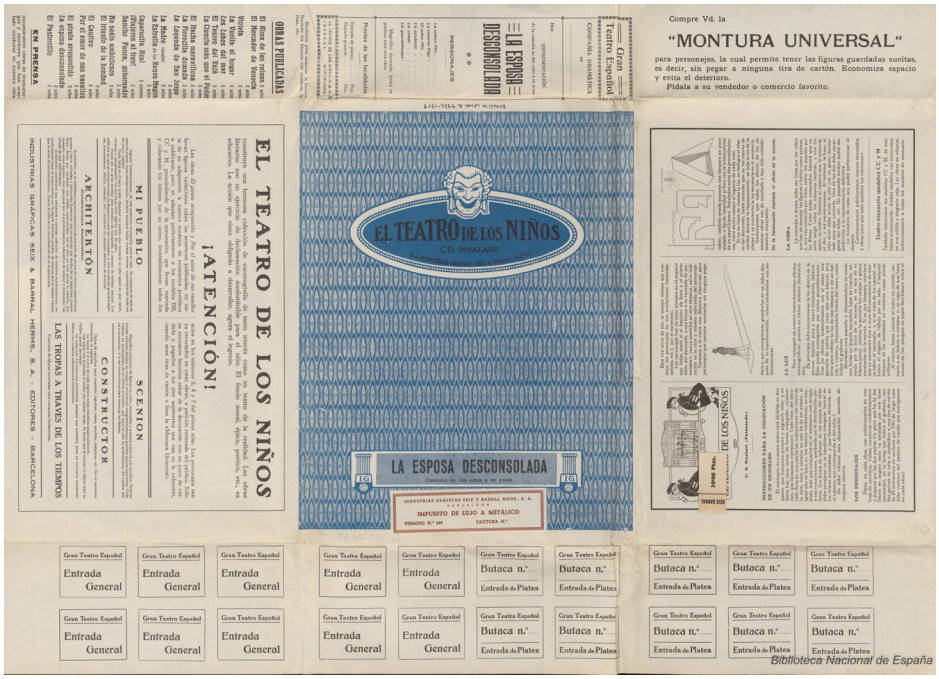
Sin duda, la luz construía un elemento fundamental para sacar el máximo provecho a la excelente calidad de sus telones. Para lograr los mejores efectos escenográficos posibles, se recomendaba jugar en una sala bien iluminada, de manera que la luz se concentrase en el interior de la escena[26]. Si el teatrito se coloca al trasluz, en ese caso resulta necesario ponerlo en el sentido contrario a un balcón o ventana, ya que «si no se tiene en cuenta la luz, se malogra el efecto del decorado; basta recordar que, en los teatros de verdad, durante la representación, se baja la luz de la platea y se concentra la luz necesaria en el escenario. Garantizamos que todos los efectos de luz de nuestras obras son de resultado y han sido cuidadosamente ensayados»[27].

[24] Excepcionalmente, la obra *La estrella de los Reyes Magos*, publicada en 1919, tenía un total de tres actos, aunque lo habitual era que tuvieran solo dos actos y que fueran «de escasa duración, para evitar el cansancio de los niños».

[25] W. Shakespeare, *La fierecilla domada*, Barcelona, Seix i Barral, 1918, Biblioteca Nacional de España, Colección *Ephemera*, EPH/500/1.

[26] Las indicaciones sobre la posición y tipo de la luz que aparecen en los sobres son muy detalladas. El objetivo de la editorial era que se pudiera sacar el máximo aprovechamiento posible a sus bellos telones, que son, sin duda, los de mayor calidad de entre todas las colecciones de teatro de papel editados en España en los siglos XIX y XX.

[27] W. Shakespeare, *La fierecilla domada*, Barcelona, Seix i Barral, 1918, Biblioteca Nacional de España, Colección *Ephemera*, EPH/500/1.



Pic. 1. Sobre desplegado de la obra *La esposa desconsolada*[28]

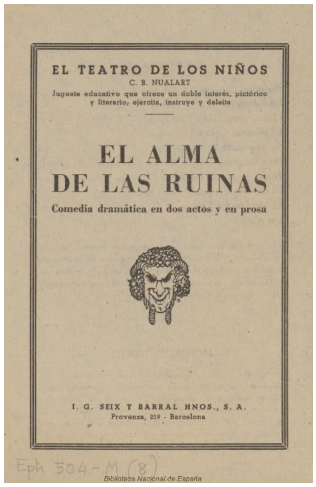
Finalmente, los sobres portaban también consejos generales sobre cómo llevar a cabo la representación de la obra[29]. El primero y principal era que quienes fueran a jugar leyeran atentamente el texto. Acto seguido, se podían montar el escenario, los telones y los personajes siguiendo las instrucciones anteriormente mencionadas. Para repartir adecuadamente los personajes y lograr la mejor representación posible de cada obra, se recomendaba a los niños tener en cuenta la edad, el sexo, las características físicas y la personalidad de personajes e intérpretes, que venía igualmente especificada. Tras comprobar que todo estaba en orden y que se había entendido el texto, ya se podía empezar a jugar:

> Se colocan dos niños, uno a cada lado del escenario, con sendos folletos de la comedia que quieren representar, repartiéndose sucesivamente el diálogo. En caso de ser más de dos los niños, se dividen los grupos, también uno a cada lado de la escena, con sus correspondientes folletos. Es conveniente ensayar el conjunto antes de una representación definitiva[30].

28 C. Barral Nualart, *La esposa desconsolada*, Barcelona, Seix i Barral, 1935, Biblioteca Nacional de España, Colección *Ephemera*, EPH/498/10.

29 Finalmente, en el sobre de cada teatro de papel aparecía siempre una relación de las obras que formaban parte de la colección, anuncios de otras publicaciones de la editorial y entradas para la función que los niños y niñas debían recortar.

30 Shakespeare, *La fierecilla domada*, cit.


EL TEATRO DE LOS NIÑOS
C. B. NUALART
Juguete educativo que ofrece un doble interés, pictórico y literario, ejercita, instruye y deleita

EL ALMA DE LAS RUINAS

Comedia dramática en dos actos y en prosa

I. G. SEIX Y BARRAL HNOS., S. A.
Provenza, 219 - Barcelona

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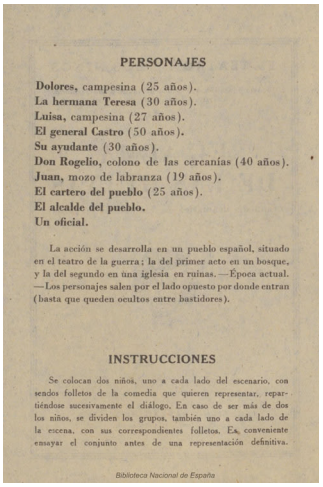
PERSONAJES

Dolores, campesina (25 años).
La hermana Teresa (30 años).
Luisa, campesina (27 años).
El general Castro (50 años).
Su ayudante (30 años).
Don Rogelio, colono de las cercanías (40 años).
Juan, mozo de labranza (19 años).
El cartero del pueblo (25 años).
El alcalde del pueblo.
Un oficial.

La acción se desarrolla en un pueblo español, situado en el teatro de la guerra; la del primer acto en un bosque, y la del segundo en una iglesia en ruinas. —Época actual. —Los personajes salen por el lado opuesto por donde entran (basta que queden ocultos entre bastidores).

INSTRUCCIONES

Se colocan dos niños, uno a cada lado del escenario, con sendos folletos de la comedia que quieren representar, repartiéndose sucesivamente el diálogo. En caso de ser más de dos los niños, se dividen los grupos, también uno a cada lado de la escena, con sus correspondientes folletos. Es conveniente ensayar el conjunto antes de una representación definitiva.

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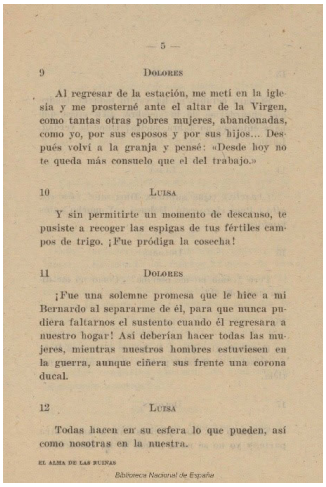

9 DOLORES

Al regresar de la estación, me metí en la iglesia y me prosterné ante el altar de la Virgen, como tantas otras pobres mujeres, abandonadas, como yo, por sus esposos y por sus hijos... Después volví a la granja y pensé: «Desde hoy no te queda más consuelo que el del trabajo.»

10 LUISA

Y sin permitirte un momento de descanso, te pusiste a recoger las espigas de tus fértiles campos de trigo. ¡Fue pródiga la cosecha!

11 DOLORES

¡Fue una solemne promesa que le hice a mi Bernardo al separarme de él, para que nunca pudiera faltarnos el sustento cuando él regresara a nuestro hogar! Así deberían hacer todas las mujeres, mientras nuestros hombres estuviesen en la guerra, aunque ciñera sus frente una corona ducal.

12 LUISA

Todas hacen en su esfera lo que pueden, así como nosotras en la nuestra.

Biblioteca Nacional de España

Pic. 2, 3, 4. Portada, contraportada y página 4 del libreto de la obra *El alma de las ruinas*[31]

A pesar de ser el elemento menos vistoso, el libreto es sin duda la parte más importante para la transmisión de valores como, en este caso, un modelo de feminidad convencional. Únicamente a través de la lectura de las obras era posible ese objetivo pedagógico que albergaban estos teatros de papel, considerados como indican en los libretos: «un juguete educativo que ofrece un doble interés, pictórico y literario, ejercita, instruye y deleita»[32]. En este sentido, son varios los elementos presentes en los libretos que nos indican que estas piezas teatrales estaban pensadas y escritas con el fin de que los niños y niñas entendieran e interiorizaran los modelos de mujer "buenos" y "malos" que se escondían tras cada una de estas historias.

La brevedad de los textos indica el cuidado que los editores tuvieron tanto a la hora de adaptar obras ya escritas como al encargar obras *ex professo* para esta colección, siendo conscientes de las capacidades del público al que iban dirigidas. La simplificación de la trama, por lo general estructurada en dos actos y con una media de 15 páginas de extensión, fue una exigencia para la colección, al igual que lo fue emplear una distribución del texto o *mise en page* sencilla con un tamaño de letra cómodo que oscilaba entre los 12 y los 14 puntos con generosos interlineados que facilitaban la lectura y que debían adaptarse a las reducidas dimensiones de los libretos, en su mayoría en un formato A5 o de cuartilla[33], es decir, de 14,8 x 21 centímetros. Sin duda, todas

31 Barral Nualart, *El alma de las ruinas*, cit.

32 *Ibid*.

33 Encontramos algunas excepciones, como en *La leyenda de San Jorge* o *La estrella de los Reyes Magos*, cuyo libreto también fue editado en un tamaño mayor.

estas características reflejan la adaptación del texto al público al que estaba dirigida su lectura, logrando la comprensión de las obras y, en consecuencia, la posible transmisión de la enseñanza correspondiente en cada caso.

El *Teatro de los Niños* puso a la venta en 1915 sus dos primeras obras de teatro de papel, *El mercader de Venecia* y *El alma de las ruinas*. Tres años después, en 1918, Seix i Barral sacó su primera gran tirada de obras con doce títulos: *Violeta*, *La vuelta al hogar*, *Los lobos al mar*, *El tesoro del Rajá*, *La Ciencia más que el Poder*, *El hacha maravillosa*, *La fierecilla domada*, *La leyenda de San Jorge*, *La madre*, *Caperucita Azul*, *¡Viajeros al tren!* y *Sancho Panza gobernador*. En 1919 sólo editó *La estrella de los Reyes Magos* y en 1927 otros cinco títulos nuevos: *No seáis ambiciosos*, *El triunfo de la bondad*, *El cautivo*, *Por el amor de sus vasallos* y *El pirata arrepentido o la doncella generosa*. Un año antes de comenzar la Guerra Civil, en 1935, Seix i Barral publicó *La esposa desconsolada* y *El pastorcillo*. Pasados muchos años, ya en 1953, el *Teatro de los Niños* sacó a la venta el que sería su último teatro de papel de la colección, basado en la ópera de Wagner, *Lohengrin*[34].

En sus historias se entremezclan de manera sigilosa el más puro entretenimiento con mensajes moralizantes dirigidos a esas conciencias infantiles que, cuanto antes, debían interiorizar las reglas de la sociedad a la que habían venido a vivir. A continuación, nos serviremos de las historias de *El alma de las ruinas*, *La fierecilla domada* y *La esposa desconsolada*[35] para tratar de comprender cómo este juguete, cuidadosamente escogido para cumplir un claro fin pedagógico, sirvió para instruir deleitando[36] a nuestra infancia.

3. *¡Que empiece la función!*

Antes de proceder al análisis propiamente de los estereotipos de género, vamos a resumir brevemente el argumento de cada una de estas tres historias seleccionadas. El primero de los teatros de papel escogidos es *El alma de las*

[34] López Sala, *Primera aproximació a la historia dels teatres de paper a Catalunya*, cit., pp. 73-103.

[35] Los teatros de papel seleccionados para este trabajo proceden de la colección *Ephemera* de la Biblioteca Nacional de España. Para saber más sobre esta colección véase R. Ramos Pérez, *Ephemera: la vida sobre papel. Colección de la Biblioteca Nacional*, Madrid, Biblioteca Nacional, 2003.

[36] Frederic Froëbel (1782-1852), María Montessori (1870-1952), Ovide Decroly (1871-1932) y Édouard Claparède (1873-1940) fueron algunos de los primeros defensores e introductores del juego en las aulas para su uso como material educativo. Para saber más véase A. Payà Rico, *Aprender jugando. Una mirada histórico-educativa*, Valencia, Universitàt de València, 2008; Id., *La actividad lúdica en la historia de la educación española contemporánea*, Valencia, Universitat de València, 2007.

ruinas[37], una comedia dramática en dos actos y en prosa escrita por Carles Barral Nualart y publicada en 1915. Esta historia se sitúa en la Primera Guerra Mundial y nos cuenta la historia de Dolores, una mujer que durante el primer acto trabaja de sol a sol en el campo realizando las tareas que hacía su marido antes de marcharse a la guerra. Sin embargo, ha llegado al pueblo la noticia de que su marido ha fallecido, pero nadie se atreve a contar la terrible noticia a Dolores, pues no quieren que pierda la ilusión que tiene por trabajar y salir adelante. Cuando finalmente Dolores descubre la verdad, en el segundo acto decide unirse a las hermanas de la Caridad de Sor Teresa para, como enfermera, curar a todos los soldados, sean del bando que sean, que acudan heridos del campo de batalla.

Pic. 5. En la fila inferior, de izquierda a derecha: hermana Teresa, Dolores, alcalde, Juan y cartero. En la fila superior, de derecha a izquierda: General Castro, ayudante, Luisa, Oficial, Don Rogelio

La segunda obra escogida es una de las comedias más populares del dramaturgo inglés William Shakespeare, *La fierecilla domada*[38], cuyo título original era *The taming of the shrew*[39]. Seix i Barral publicó esta adaptación en 1918 y cuenta la historia de Catalina, una joven rebelde que se niega a acatar la autoridad de su padre, Bautista, quien busca desesperadamente un pretendiente que su hija acepte en matrimonio. Sin embargo, Catalina rechaza a todos los jóvenes que van hasta su casa, hasta que un día llega un joven italiano llamado Petruchio que está decidido a "domar a la fiera" y acabar con el mal temperamento de Catalina. El segundo acto, que transcurre en el lujoso salón de la casa de campo de Petruchio, da inicio con una Catalina completamente transformada, convertida

37 Barral Nualart, *El alma de las ruinas*, cit.

38 Shakespeare, *La fierecilla domada*, cit.

39 Aunque se ha hablado de las posibles influencias de otras obras y autores, como *Las mil y una noches*, Juan Luis Vives, Agustín de Rojas o Calderón de la Barca, entre otros, lo único que parece claro es que el argumento principal de *The taming of the shrew*, está inspirado en el cuento XLV *De lo que sucedió a un mancebo el día que casó* de la famosa obra *El conde Lucanor* de don Juan Manuel. P.J. Duque, «*The taming of the shrew*» *y sus antecedentes españoles*, «ES: Revista de filología inglesa», n. 8, 1978, pp. 199-221.

Pic. 6. De izquierda a derecha: Catalina, Petruchio, Bautista, Grumio – sirviente de Petruchio – y Carlos – sirviente de Bautista –. Los personajes han sido vestidos siguiendo la moda de finales del siglo XVI

en una mujer dócil y sumisa a la voluntad de su ya marido Petruchio. Para lograr cambiar el carácter de Catalina, Petruchio juega con ella y la hace sufrir para lograr "moldear" su temperamento y hacerla sumisa a su voluntad. La obra finaliza con una Catalina que reconoce ante su padre haber comprendido la importancia de que una mujer acate la opinión y voluntad de su marido como la única verdadera.

El tercer y último teatro de papel escogido es *La esposa desconsolada*[40], una comedia en dos actos y en prosa también escrita por Carles Barral Nualart y publicada en 1935 que nos habla de la infelicidad de una mujer al dejar marchar a su esposo que debe luchar en la guerra. El primer acto transcurre en el claro de un bosque donde la protagonista, la señora Pils, y su ayudante, la señorita Olga, se encuentran hablando de la angustia que siente la primera por la ausencia de noticias de su marido y el devenir de la guerra. Aunque la señorita Olga hace todo lo posible por animarla, lo cierto es que la señora Pils no logra ver la felicidad sin su marido cerca. El segundo acto tiene lugar en el jardín de una finca señorial donde ambas se encuentran de nuevo hablando sobre el sufrimiento y la infelicidad de la señora Pils cuando, de pronto, un criado entra en escena con una carta en la mano. Rápidamente la señora Pils reconoce la letra manuscrita de su marido y cree desvanecer de la emoción. Justo entonces, el señor Pils entra y el matrimonio se reencuentra felizmente, aunque no por

40 Barral Nualart, *La esposa desconsolada*, cit.

Pic. 7. De izquierda a derecha: un criado, un ayudante, la señorita Olga, el señor Pils, la señora Pils y un guardabosques

mucho tiempo, pues el permiso del señor Pils es breve y debe volver al frente. Esta noticia devuelve de nuevo a la señora Pils a la más profunda tristeza, aunque el matrimonio confía en que pronto puedan reunirse en su hogar junto a su hijo y recobrar la verdadera felicidad.

Estos tres teatros de papel nos van a descubrir un ideal de feminidad basado en la constante sumisión, subordinación, fidelidad de la mujer al hombre, en definitiva, un ideal de mujer servicial para quien la felicidad no está en ella misma, sino en los demás. Frente a este ideal de feminidad nos encontraremos un prototipo de masculinidad patriarcal basado en la superioridad, la dominación, la autoridad, el control e, incluso, en algunas ocasiones, en el uso legítimo de la violencia sobre la mujer[41]. Educadas en estos dogmas socio-culturales durante siglos, el resultado ha sido que la ideología que da sentido al modelo de sociedad patriarcal ha calado en nuestra sociedad, inundando todos los ámbitos de la vida[42]. A ello no escapaban los teatros de papel, que no son sino un ejemplo más de las muchas herramientas que han servido históricamente para la transmisión, interiorización y mantenimiento de un modelo social en el que la mujer está subordinada al hombre en su eterna función de la perfecta madre, esposa y ama de casa.

41 Sobre la construcción de los estereotipos de género, véase M. Nash (coord.), *Feminidades y masculinidades. Arquetipos y prácticas de género*, Madrid, Alianza, 2014.

42 B. Anderson, *Historia de las mujeres. Una historia propia*, Barcelona, Crítica, 2009, pp. 831-832.

4. *El ideal de la esposa perfecta*

A continuación, vamos a analizar los diálogos de *El alma de las ruinas*, *La esposa desconsolada* y *La fierecilla domada* para, a través de sus textos y de los mensajes que en ellos van ocultos, ver dónde y cómo está presente el estereotipo de la perfecta esposa y así analizar su transmisión al joven público lector de estas historias de teatro infantil. Estos estereotipos nos permitirán comprobar cómo los teatros de papel fueron un producto más de la literatura infantil y juvenil de la época empleado como medio de instrucción de las niñas en el ideal femenino imperante, reforzándose así a través del juego y de la lectura lo que las niñas aprendían y veían en la escuela, en su casa y, en general, en la sociedad en la que vivían.

Para ahondar en ese ideal de esposa perfecta al que las niñas estaban llamadas a jugar toda su vida, comenzaremos con el análisis de *El alma de las ruinas*[43]. Como hemos visto, la protagonista de la historia sufre por la ausencia de noticias de su marido, quien está luchando en la Primera Guerra Mundial y de quien no ha recibido ninguna carta desde su marcha:

> Dolores: Cuatro meses que parecía que no iban a acabarse nunca… Y en todo ese tiempo, ni una carta, ni un informe, ni una noticia. ¡Si hay para volverse loca![44]

Las guerras han sido uno de los pocos contextos en los que las mujeres han podido históricamente acceder al ámbito público sin restricciones y sin importar su clase social. El inicio de cualquier conflicto bélico obligaba, por lo general, a que las mujeres abandonaran la esfera privada, lugar destinado para ellas en la sociedad, para ocupar el lugar de sus maridos en el ámbito público hasta su regreso[45]. De este modo, la marcha de su esposo a la guerra obliga a Dolores, como a tantas otras mujeres, a realizar las tareas en el campo que hasta entonces realizaba él:

> Dolores: Al regresar de la estación, me metí en la iglesia y me prosterné ante el altar de la Virgen, como tantas otras pobres mujeres, abandonadas, como yo, por sus esposos y por sus hijos […] Después volví a la granja y pensé: «Desde hoy no te queda más consuelo que el del trabajo».
> Dolores: ¡Fue una solemne promesa que le hice a mi Bernardo al separarme de él, para que nunca pudiera faltarnos el sustento cuando él regresara a nuestro hogar! Así deberían hacer todas las mujeres, mientras nuestros hombres estuviesen en la guerra, aunque ciñera sus frentes una corona ducal[46].

[43] Barral Nualart, *El alma de las ruinas*, cit.

[44] *Ibid*., p. 3.

[45] Sobre la división sexual de espacios y funciones véase C. Amarós, *Espacio de los iguales, espacio de las idénticas. Notas sobre poder y principio de individuación*, «Arbor», n. 503-504, 1987, pp. 113-128.

[46] Barral Nualart, *El alma de las ruinas*, cit., p. 5.

Desde entonces, Dolores se entrega en cuerpo y alma a su nueva labor y, por ello, todo el pueblo se siente perplejo y admirado por su enorme fuerza de voluntad a pesar de la ausencia de noticias sobre su esposo:

El General: […] Pero no sé qué admirar más: si el heroísmo de nuestros hombres o el de nuestras mujeres… ¿No se ha fijado usted en esa pobre campesina que salía de aquí cuando llegábamos nosotros?
Juan: […] Con lo que trabajas tú desde que amanece hasta que el Sol se pone, te estás matando verdaderamente. […] Todo el mundo en el pueblo lo dice… No son faenas para una mujer… Yo soy joven y robusto… Yo te ayudaré hasta que vuelva tu marido[47].

Sin embargo, Dolores siente que sus vecinos le ocultan algo y que saben que su marido ya ha fallecido, por lo que les presiona hasta que el General confiesa la verdad y le pide que, a partir de ahora y para consolar su pérdida, se entregue a las tareas que realizan las hermanas de la Caridad de Sor Teresa en el cuidado de los enfermos que trae la guerra:

El General: […] Piensa, Dolores, que en estos críticos momentos España necesita tanto de sus mujeres como de sus hombres. Toma como ejemplo de energía espiritual a Sor Teresa, esa admirable hermana de la Caridad, que no muy lejos de aquí, en vuestra derruida iglesia, no ha dejado ni un solo momento de atender a sus heridos en medio de la destrucción y la muerte[48].

El de cuidado de los enfermos era una tarea que, dentro de la construcción de una sociedad patriarcal, siempre había correspondido a las mujeres. Es por ello que la profesión de enfermeras, como la de maestras, será uno de los primeros trabajos ejercidos por las mujeres en el ámbito público[49]. Tras conocer el fallecimiento de su marido, Dolores decide consagrar el resto de su vida al cuidado de los demás, curando enfermos sin distinciones de bandos.

Dolores: No, sor Teresa; en mi alma no arde más que una ascua inmensa de amor espiritual para mis hermanos, que ya sé que son todos los hombres, sin distinción de colores ni de razas. Antes no amaba más que a mi marido; ahora mi amor se derrama sobre todas las criaturas humanas.
Sor Teresa: Ahora estás en el verdadero camino de la perfección, Dolores[50].

Valores algo parecidos son los que vamos a encontrar en *La esposa desconsolada*[51], una historia que busca transmitir a las niñas que la felicidad de una mujer está siempre junto a su marido sin el que, lógicamente, nunca podrán ser felices. Este modelo de mujer busca hacer de las niñas mujeres

47 *Ibid*., pp. 7-11.
48 *Ibid*., p. 13.
49 Sobre las mujeres y el trabajo, véase: M. Nash, *Mujer, familia y trabajo (1875-1936)*, Barcelona, Anthropos, 1983.
50 Barral Nualart, *El alma de las ruinas*, cit., p. 17.
51 Id., *La esposa desconsolada*, Barcelona, Seix i Barral, 1935, Biblioteca Nacional de España, Colección *Ephemera*, EPH/498/10.

sumisas que no aspiren a encontrar la felicidad en sí mismas, sino en el hombre que las acompañe en la vida. Aquí también encontramos a una mujer que sufre por la ausencia de su esposo que está luchando en la guerra, sin embargo, en este caso la marcha del señor Pils no hace que la mujer ocupe su lugar en el ámbito público, sino que simplemente verá su vida reducida a una constante, desconsolada y angustiosa espera de noticias de su esposo:

La señora Pils: [A la señorita Olga] Esa idea ha estado manteniendo mi esperanza durante mucho tiempo, bien lo sabes Olga. Pero la esperanza ha cedido el puesto al desengaño, y ya nada podrá aliviar mi pesar, ni estos bellos países, ni los viajes, ni las lecturas (*Solloza)*.
La señora Pils: Como quieras. Ya sabes que te dejo en libertad de organizar nuestra vida, pues no tengo gusto por nada ni ánimos para tomar la menor iniciativa.
La señora Pils: ¡Oh, amiga! Otro sería el gusto con que realizaría esta excursión si pudiese ver a mi lado a mi esposo querido y a mi hijo idolatrado[52].

Al contrario de lo que sucede con Dolores en *El alma de las ruinas*, el retorno del señor Pils en el segundo acto supone la más inmensa de las alegrías para la señora Pils quien, con su marido en casa, ya puede volver a ser feliz:

La señora Pils: *(Casi desmayada por la emoción)* ¡Tú, mi Jorge! ¡Tú, vivo! ¡Oh, felicidad! Me parece un sueño verte a mi lado y no obstante es cierto: eres tú, eres tú mismo con tus cabellos rubios y tus ojos azules que me miran con cariño.
La señora Pils: ¡Oh, querido Jorge! Me parece que renazco a una nueva vida. Verte otra vez a mi lado vivo, sonriente como antes, es una dicha tan grande que casi me faltan fuerzas para soportarla[53].

Durante el tiempo que el señor Pils ha estado ausente, su vida se ha detenido y solo el regreso de su esposo vuelve a dar sentido a su existencia. Por ello, al saber que es probable que tenga que volver al frente, la señora Pils no puede ni tan siquiera soportar la idea, y la noticia supone para ella una nueva agonía y, por tanto, un retorno inevitable a la infelicidad:

La señora Pils: Para acabar de ser feliz, sólo me falta que esa terrible guerra se termine. Porque pasados estos días de felicidad, ¿qué me reserva el porvenir? Si dentro de poco vuelves a servir en el ejército, ¿quién me asegura que podré volver a estrecharte entre mis brazos?[54]

En consecuencia, lo único que le queda a la señora Pils es sufrir otra vez ante la espera de noticias sobre su esposo que debe marchar de nuevo la guerra, recuperando únicamente la felicidad cuando él esté definitivamente de vuelta. Por lo tanto, *La esposa desconsolada* es una historia que busca enseñar a las pequeñas lectoras la importancia de ubicar su felicidad en el hombre que tengan

[52] *Ibid*., pp. 4-10.
[53] *Ibid*., pp. 15-16.
[54] *Ibid*., p. 17.

a su lado, de forma que cada vez que estén solas serán, irremediablemente, «mujeres desconsoladas».

Frente a ese modelo ideal que toda mujer debía cultivar, *La fierecilla domada*[55] nos retrata en su primer acto el contra-ideal de feminidad a través de la protagonista de la obra, una Catalina que representa en sus ideales y en su conducta el prototipo de mujer que las niñas no debían aspirar a ser. Evitar y condenar la rebeldía, obedecer a los hombres sin cuestionar sus actos y decisiones (tanto de padres como de maridos), mostrarse sumisa y dócil, y no tener opinión propia son las virtudes que en esta obra se pretenden inculcar a las niñas.

Ya el título de la obra nos desvela la moraleja de la historia: toda mujer que se aleja del modelo impuesto se arriesga a sufrir y merece un castigo. De nada sirve oponerse, pues al final un hombre acabará "domándola" para que vuelva al lugar que le corresponde. Eso es precisamente lo que le pasa a Catalina, una mujer con mucho carácter y autonomía que logra en el primer acto desobedecer constantemente la autoridad de su padre Bautista en su objetivo de casarla. Bautista, por culpa de la terquedad de su hija, es un hombre desdichado, pues Catalina le impide cumplir su misión como padre: encontrar para su ella un marido que la proteja.

Bautista: Pero, ¿no comprendes que, a causa de tu infernal carácter, hemos de estar mudando de criadas todos los días?… Pero, ¿cuándo será el día que te cases?
Bautista: Pues has de saber que yo ya no puedo aguantarte más. Si no te casas, cualquiera que fuere el pretendiente, te meto en un convento.
Bautista: ¡Al contrario! Lo que temo es no poder casarla nunca […] No hay hombre tan valiente[56].

El complicado temperamento de la protagonista hace que todos los que la rodean la teman y, por ello, se dirijan a ella con términos muy despectivos hacia la mujer, como vemos en los siguientes diálogos entre padre y pretendiente:

Bautista: ¡Dios mío! ¡Esto no es una mujer, es un *arcabucero*!
Petruchio: […] ¡Que venga, pues, esa *fiera*, que yo me encargo de domarla!
Bautista: […] ¡Es un *monstruo insufrible*, es una *arpía*! […] Dime, *mala pécora*, ¿qué has hecho con ese pobre músico?
Petruchio: ¡Pues ya lo creo! Dicen que tenéis un genio infernal, que sois una arpía […] que no se os puede sufrir […] que cuando os contratarían dais pataditas en el suelo […][57].

[55] W. Shakespeare, *La fierecilla domada*, Barcelona, Seix i Barral, 1918, Biblioteca Nacional de España, Colección *Ephemera*, EPH/500/1.
[56] *Ibid*., pp. 4-6.
[57] *Ibid*., pp. 5-16.

El hecho de que Catalina se niegue reiteradamente a cumplir su obligación de contraer matrimonio va a hacer que a lo largo del primer acto padre y pretendiente hablen reiteradamente de la necesidad de «domar a la fiera» y, en caso de no quedar otra opción, recurrir a la violencia física para logarlo. Así lo vemos en el siguiente diálogo entre Catalina y Petruchio:

Catalina: Si me tocáis un solo dedo, os largaré un bofetón.
Petruchio: Y yo me quedaré con él para devolvéroslo duplicado.
Catalina: ¿Sois de esos hombres que pegan a las mujeres?
Petruchio: A las mujeres, ¡no! A la mía, nada más que a la mía.
Petruchio: Lo que yo busco es someteros […] domaros.
Petruchio: ¡Quieta, fierecilla, quieta! Soy más fuerte que tú. Tendrás que humillarte.
Petruchio: […] ¡Nada, ni una palabra! ¡Ni la menor protesta! ¡Lo mando yo, que no quiero que tengas más voluntad que la mía! ¡Ay de ti si llegas a decir que no! ¡Es mi santa voluntad! ¡Lo quiero, lo ordeno, lo exijo! […][58]

La transformación de la protagonista en el segundo acto hace que todos vean a Catalina como una mujer irreconocible que, al fin, ha comprendido su misión en la vida: ser una perfecta esposa al servicio de su marido. Para dar cierre a la obra, Catalina pronuncia este discurso final que resume para las lectoras su transformación del contra-ideal al modelo de esposa perfecta:

Catalina: Padre, he visto y me he convencido de que las mujeres díscolas y soberbias malogran y desbaratan la paz del hogar. Debemos considerar al marido como nuestro señor y nuestro apoyo. Él tiene que afrontar la batalla de la vida, sufrir los trabajos y las vigilias para que nosotras vivamos tranquilas y dichosas en nuestras casas. ¿Qué nos pide el hombre, en cambio? Cariño y dulzura […] Sería injusto negárselos[59].

De este modo, la historia de *La fierecilla domada* servía para transmitir a las lectoras, por un lado, el modelo opuesto de una buena mujer a través de la Catalina del primer acto y, en segundo lugar, el ideal de mujer encarnado en el estereotipo de la esposa perfecta que acepta su destino casándose con el hombre que su padre ha escogido para ella. La Catalina de la segunda parte de la obra de Shakespeare es ya una mujer que no lucha por sus propios sueños o aspiraciones, que no tiene autonomía ni opinión propia, sino que permanece bajo la voluntad de la autoridad masculina que le corresponde en cada caso, de niña la de su padre y de adulta la de su esposo. Una vez contraído matrimonio, su única aspiración vital será la de complacer a su marido, cuya felicidad será a partir de entonces la suya propia.

[58] *Ibid*., pp. 14-19.
[59] *Ibid*., pp. 34-35.

Conclusiones

Las historias de Dolores, la señora Pils y Catalina, protagonistas de las tres obras de teatro de papel seleccionadas para este trabajo de entre las 23 publicadas para la colección del *Teatro de los Niños* de Seix i Barral, nos han permitido descubrir un modelo de mujer convencional que sin duda ha sido el protagonista de nuestra sociedad durante siglos y que, a través de la lectura y representación de sus obras, era transmitido a la infancia española de la primera mitad del siglo XX. En casa, en la escuela y en todos los ámbitos de la vida posibles estaba presente este prototipo de mujer subordinada al hombre, a quien estaban destinadas las funciones propias del ámbito privado frente a la acción en el espacio público, reservada al hombre en el ejercicio de su superioridad social. Para que las niñas pudieran interiorizarlo, todas las esferas posibles de la vida quedaban impregnadas de esta división sexuada de espacios y funciones, de modo que incluso el juego, gracias a su poder educativo, también puso su granito de arena en el mantenimiento de esta construcción sociocultural heteropatriarcal.

La lectura de estas obras de teatro infantil, como ocurría con la de otras tantas obras destinadas a este emergente público, acercó a los niños y niñas tanto obras clásicas adaptadas a sus incipientes capacidades lectoescritoras, como obras escritas exprofeso para ellos, donde siempre estaban presentes algunos ideales y valores socioculturales imperantes en la época, entre los que también se encontraban los modelos de feminidad y masculinidad. Con el fin de que pudieran comprender «el mundo de los mayores» desde la infancia, la literatura y los juegos infantiles y juveniles instruían a los niños y niñas en los roles de género y en la establecida complementariedad de los sexos. Así, para que el hombre pudiera actuar en total libertad en el ámbito público, la mujer debía permanecer en el privado, lográndose de este modo un perfecto equilibrio de espacios y funciones marcadas por la diferenciación del género. La pervivencia de este equilibrado sistema pasa por la enseñanza del mismo desde la infancia, de modo que libros y juegos son en este sentido reflejo de esos modelos de hombre y mujer ideales.

El modelo de masculinidad tiene sus raíces en la superioridad, la virilidad, la autoridad e, incluso, la legitimación y naturalización del uso de la violencia contra las mujeres. Por el contrario, el modelo de feminidad se apoya en valores como la sumisión, la subordinación, el respeto y la obediencia a la autoridad masculina que corresponda en cada caso. Así lo hemos visto a través de las protagonistas de *El alma de las ruinas*, *La esposa desconsolada* y *La fierecilla domada*, mujeres que, antes o después, comprenden su posición en la sociedad: ser una perfecta esposa, al servicio de su marido, para quien la verdad no es otra que la que él disponga y cuya felicidad no se encuentra en sí misma sino en los demás.

A través de Catalina hemos podido ver lo que sucede si se decide seguir el «mal camino». El uso de la violencia sobre la joven se vuelve algo "necesario" que, además, se presenta con total naturalidad ante las pequeñas lectoras. De este modo, la violencia se convierte en una herramienta imprescindible para la transformación de una mujer que está fuera de las reglas establecidas, como Catalina, en una mujer modélica según la mentalidad. Pero sin duda, lo más grave de todo ello es que la justificación del ejercicio de la violencia machista siga estando a la orden del día en la sociedad española casi cuatrocientos años después de que Shakespeare escribiera esta obra en el siglo XVI, normalizándose así que Seix i Barral adaptase esta obra y la publicase en pleno siglo XX a pesar de su contenido ideológico en contra de la igualdad de derechos entre hombres y mujeres.

En definitiva, estas tres obras de teatro infantil en papel son un ejemplo más del uso histórico de los productos escritos para la transmisión y perpetuación de un modelo de sociedad basado en la inferioridad de la mujer frente al hombre y que, enseñado desde la infancia y a través de todos los medios posibles, ha logrado perdurar siglo tras siglo. Solo una sociedad impregnada de valores de igualdad y libertad puede cambiar el rumbo de la historia.

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Università, ideologie e potere. La comunità di discorso universitaria del primo franchismo

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University, ideologies and power. The university community of discourse in the first francoist period

ABSTRACT: The article offers a critical reading of the debate concerning the definition of the role of the University that took place within the Spanish academia during the early years of the Franco regime (1939-1943). By analyzing several primary sources, it reconstructs the life cycle of the community of discourse that contributed to build the national ideology. In particular, it shows its different souls, its attempts of unification, and its continuous struggles for hegemony. Accordingly, the article demonstrates the existence of a strict relation between the university and the socio-political reality. Moreover, it proves that this close connection, where the two spheres overlap one another, leads to a perversion of the university's own mission.

EET/TEE KEYWORDS: Francoism; University; Community of discourse; Spain; XXth Century.

Introduzione

Unas de las tareas que apremiaba a nuestra juventud combatiente era la de llevar el espíritu de nuestra Cruzada al plano de la Universidad. Era preciso afrontar el problema doble: de una parte la Universidad española no podía ser neutra en el orden de las ideas. Tenía que definirse ideologícamente y confesar que estaba dentro o fuera de la concepción cristiana del mundo y de la vida. Por otro lado, la Universidad no era tampoco un ente intemporal que pudiese estar situado al margen del movimiento político que aspiraba a cambiar de raíz

la vida y la estructura de la Patria. Había, pues, que definir el estilo de la Universidad en función de dos postulados trascendentes: lo religioso y lo político[1].

Così il direttore della «Revista de Educación Nacional», Pedro Rocamora, nel giugno del 1943, sintetizzava i termini della questione che aveva animato nei cinque anni precedenti il dibattito intellettuale e politico spagnolo sulla riforma universitaria, e il cui progetto di legge la *Comisión de Educación* s'accingeva a discutere. Tale interpretazione della vicenda rivela da una parte una distorsione della realtà rispetto all'evoluzione del dibattito, che si ricostruirà e analizzerà in questo articolo[2], mentre dall'altra la rilevanza di ciò che rappresentò uno dei maggiori terreni di scontro della storia politica e culturale spagnola nel corso di tutto il ventesimo secolo: la politica universitaria. Le parole citate hanno il pregio di mettere in luce come, per sua stessa natura, l'Università evolva sempre in stretto rapporto con le istituzioni e i regimi politici nei quali è inserita e in relazione ai diversi fini da questi perseguiti[3]. Tanto nel rapporto con l'esterno che nella sua dinamica interna, l'istituzione accademica riproduce relazioni sociali e politiche. In essa, infatti, l'apparente dualità tra la creazione di un sapere neutrale ed oggettivo da una parte e l'accumulazione di un potere personale o di gruppo dall'altra – esercitato sia all'interno del mondo accademico che della sfera sociale[4] – si risolve nella creazione di comunità di discorso più o meno chiuse i cui processi di formazione e consolidamento corrispondono alla risultante di queste due forze[5]. Così, la sfera del Politico e quella dell'Università

1 P. Rocamora, *Editorial*, «Revista de Educación Nacional», vol. 30, Giugno 1943, pp. 4-5.

2 La struttura e l'ideologia dell'università franchista è stata oggetto frequente di studio negli ultimi anni. Molti studi hanno ricostruito il processo di epurazione del corpo docenti dall'Università, mettendo in evidenza la portata del fenomeno dal punto di vista quantitativo e qualitativo. C. Rodríguez López, *La Universidad de Madrid en el primer franquismo. Ruptura y continuidad (1939-1951)*, Madrid, Dykinson, 2002; J. Claret, *El atroz desmoche. La destrucción de la Universidad española por el franquismo, 1936-1945*, Barcelona, Crítica, 2006; L.E. Otero Carvajal (ed.), *La destrucción de la ciencia en España: Depuración universitaria en el franquismo*, Madrid, Editorial Complutense, 2006. Altri studi hanno affrontato la questione del successivo processo di costruzione del nuovo ordine universitario, in particolare J. Carreras Ares, M.A. Ruiz Carnicer (edd.), *La Universidad española bajo el régimen de Franco (1939-1975)*, Zaragoza, IFC, 1991; M.A. Sotés Elizalde, *Universidad Franquista: debate sobre la libertad de enseñanza (1930-1962)*, Pamplona, EUNSA, 2004; L.E. Otero Carvajal (ed.), *La Universidad nacionalcatólica. La reacción antimoderna*, Madrid, Dykinson, 2014.

3 Sul legame tra università e politica nella Spagnola contemporanea J.M. Fernández Soria, *Educación, socialización y legitimación política: España 1931-1970*, Valencia, Tirant Lo Blanch, 1998; P. Galán, *Educación, história y política. Las claves de un compromiso*, Madrid, Biblioteca Nueva, 2009; M. de Puelles Benítez, *Educación e ideología en la España contemporanea*, Madrid, Tecnos, 2010.

4 P. Bourdieu, *La spécificité du champ scientifique et les conditions socials du progrès de la raison*, «Sociologie et Société», vol. 7, n. 1, 1975, pp. 91-118 e Id., *Champ du pouvoit, champ intellectuel et habitus de classe*, «Scoliès», vol. 1, 1971, pp. 7-26.

5 J. Angermuller, *How to become an academic philosopher. Academic discourse as a multileveled positioning practice*, «Sociología Histórica», vol. 2, 2013. Utili gli studi di R. Collins, in particolare *The Credential Society: An Historical Sociology of Education and Stratification*, New

finiscono fatalmente per affiancarsi compromettendo la propria reciproca autonomia e, talvolta, l'una finisce per racchiudere al suo interno l'altra. In simili casi, laddove l'Università «no puede ser neutral en el orden de las ideas», essa finisce per ricoprire il ruolo della politica, vale a dire di creazione delle basi del consenso inteso come trasmissione e accettazione d'una precisa concezione del mondo.

Il caso fatto oggetto di studio in questo articolo appartiene a questa circostanza. Si tratta del tentativo, da parte della classe dirigente intellettuale del *Nuevo Estado* franchista, di ridefinire l'identità nazionale attraverso una radicale riforma dell'Università. Un caso in cui un'intera classe intellettuale non fu solo portata ad «andare dove il mondo va»[6] – come scriveva polemicamente Croce in riferimento all'Italia sotto il fascismo –, quanto piuttosto a definire la via da seguire e a premere perché ci si incammini verso di essa. Nel corso di tale processo si delinearono e trasmisero le linee ideologiche, combattendo aspre lotte per la supremazia d'una fazione sull'altra. Se è vero che «è nella costituzione dei gruppi che ci si rende meglio conto dell'effettualità delle rappresentazioni, e in particolare delle parole, delle parole d'ordine e delle teorie che contribuiscono a creare l'ordine sociale, imponendo i principi di di-visione»[7], in virtù dell'osmosi tra accademia e politica è proprio seguendo l'evolversi della discussione all'interno della prima che si finirà per chiarire i contorni della seconda.

1. *Che identità nazionale? Le posizioni in campo*

Dopo la vittoria nella guerra civile, per le camicie blu di Franco e per l'amalgama di forze che appoggiarono il *Caudillo* si aprì un percorso di definizione della propria identità[8]. Il collante che aveva reso possibile un fronte politico compatto nel corso degli anni precedenti si era venuto costruendo *per via negationis* come reazione nei confronti della II Repubblica[9]. Così, fatte tacere

York, Academic Press, 1979; e Id., *The Sociology of Philosophies: A Global Theory of Intellectual Change*, Belknap, Harvard University Press, 1998.

6 B. Croce, *Postille*, «La Critica», vol. 31, 1933, pp. 159-160.

7 P. Bourdieu, *La parola e il potere. L'economia degli scambi linguistici*, Napoli, Guida, 1988.

8 F. Gallego Margalef, *El evangelio fascista. La formación de la cultura polìtica del franquismo (1930-1950)*, Barcelona, Crítica, 2014, p. 20: «La fascistización no es el crecimiento de un partido con ideología y proyecto politico acabados, constituidos en el momento de su creación.[…] Es el proceso por el que la contrarrevolución española, y europea, va sintetizando posiciones doctrinales y agrupando proyectos políticos, estableciendo un campo de influencias y correcciones mutuas, canalizando la fluidez de sus intercambios ideológicos, asentando sus compromisos estratégicos». Non vi è quindi un'essenza ideologica franchista che preesista alla sua esistenza fenomenologica.

9 La stessa falange si autodefinì come un movimento rivoluzionario. Cfr. M. Ballesteros, T. Escolar, D. Porres, *Consígnas Nacional-Sindicalista*, Santander, 1938. Tale tensione rivoluzionaria

con la violenza le voci contrarie, si cercò di supplire rapidamente alla carenza dottrinale per rendere possibile l'instaurarsi di una nuova classe dirigente capace di dar voce al *Nuevo Estado*, il quale allora costituiva un mero significante vuoto, un *flatus* retorico privo di definizione. L'Università, reale campo di battaglia nel corso della guerra civile[10], fu la principale istituzione all'interno della quale prese forma il dibattito tra le diverse anime politiche impegnate a tratteggiare i contorni del nuovo corso e legittimare il cambiamento che aveva avuto luogo *de facto* prima ancora d'essere teorizzato con esattezza *de iure*[11]. Queste diverse anime possono essere schematicamente ricondotte a tre prospettive generali: a) distruzione del passato repubblicano; b) cristianizzazione; o 3) fascistizzazione del nuovo regime.

1.1 *Distruzione*

La controrivoluzione pedagogica[12], intesa come reazione alla tradizione politica repubblicana e liberale, indirizzata contro l'intero mondo intellettuale[13] fu tale quasi esclusivamente durante il ministero di Pedro Sainz Rodríguez[14] in carica dal 30 gennaio 1938 al 27 aprile 1939. Egli diede avvio al processo di epurazione del personale docente che contrassegnò la prima fase della presa di potere da parte delle forze franchiste[15]. Durante la sua precedente militanza

e la sua mancata realizzazione faranno poi strada ad un'altra espressione ricorrente all'interno della retorica falangista, quello di «revolución pendiente»; cfr. C. Molinero e P. Ysás, *La Anatomía del Franquismo. De la supervivencia a la agonía (1945-1977)*, Barcelona, Crítica, 2008, p. 18.

10 L'Università di Madrid fu infatti simbolo del dominio liberale nel corso della II Repubblica. S. López-Rios Moreno, J.A. Gonzáles Cárcel (edd.), *La facultad de Filosofía y Letras en la Segunda República*, Madrid, Conmemoraciones Culturales, 2008. Nel corso della guerra civile, l'università rappresentò uno dei fronti più duri della lotta tra i due blocchi: «El campus pasó de ser un espacio iluminado por el idealismo educativo, intelectual y arquitectónico a convertirse de la noche al día en un sombrío y sangriento territorio de lucha», P. Calvo Sotelo, *75 Años de la Ciudad Universitaria de Madrid. Memoria viva de un campus trascendental*, Madrid, Complutense, 2004, p. 116.

11 Gallego Margalef, *El evangelio fascista. La formación de la cultura polìtica del franquismo (1930-1950)*, cit., p. 591: «La teorización de un Estado nacional, totalitario, católico y revolucionario se encontraba con el camino preparado por una guerra que hacía que tales reflexiones fueran más el resultado de la conquista del poder en el proceso bélico que de una tarea de propaganda y convencimiento lanzado desde las cátedras en las que se formulaban los nuevos principios».

12 L' espressione è usata da J.R. López Bausela, *La contrarrevoluciòn pedagogica en el franquismo de guerra. El proyecyo politico de Pedro Sainz Rodrìguez*, Madrid, Biblioteca Nueva, 2011, p. 24.

13 E. Suñer, *Los intelectuales y la tragedia española*, San Sebastian, Editorial España, 1938.

14 Su tale figura politica A. Alted Vigil, *Política del nuevo Estado sobre el patrimonio cultural y la educación durante la guerra civil española*, Madrid, Ministerio de Cultura, 1984.

15 Lungo tre direttrici chiave si può sintetizzare il lavoro del ministro per Claret, *El atroz desmoche. La destrucción de la Universidad española por el franquismo, 1936-1945*, cit., pp. 44-45: «La finalización de la cobertura legal de la depuración de los docentes, el embastado de la

nell'*Associación Católica Nacional de Propagantistas* Sainz Rodríguez già aveva posto le basi per la sua riforma pedagogica sostenendo la necessità di fondare il nuovo patriottismo sulla base di una costante esaltazione dei valori della religione cristiana, essenza dell'antica quanto della futura Spagna[16]. Ciò egli ribadì anche in veste di ministro, per esempio durante un discorso pronunciato di fronte ai maestri elementari nel 1938[17]. Sostenuto dal potente cardinale di Toledo Gomá y Tomás, il ministro era il portavoce di quell'ala più oltranzista del cattolicismo spagnolo che si era venuta definendo proprio sulla base dell'opposizione ai valori liberali e laici che avevano avuto la loro più compiuta realizzazione negli anni appena precedenti. Questa linea fu seguita durante gran parte di questo primo periodo, tanto che il 30 Aprile del 1939, presso l'*Universidad Central* di Madrid, ebbe luogo uno spettacolare *Auto da Fé* in cui vennero bruciati i libri che il regime considerava laicizzanti, massonici, comunisti e antispagnoli[18].

1.2 *Cristianizzazione*

La componente cattolica del regime franchista è assai nota, ed emerge in maniera esemplare esaminando le tesi sostenute in particolare dal gesuita Enrique Herrera Oria, fratello del più noto Ángel, fondatore dell'*Asociación Católica Nacional de Propagandistas* (ACNdP)[19]. I riferimenti di Herrera Oria

nueva legalidad nacional-católica (a través de medidas como la ley de Secundaria) y, sobre todo, la configuración de la cúpula ministerial. Todos lo altos cargos respondían a una clara adscripción católica y coherencia doctrinaria con los orígenes del franquismo que garantizaba la continuidad ideológica de la institución».

16 P. Sáinz Rodríguez, *La Tradición nacional y el Estado futuro*, Madrid, Cultura Española, 1935, p. 19. Lo Stato: «No puede menos de pedir como un honor y una carga el colaborar con la Iglesia en los altos fines de formación y de educación religiosa del ciudadano».

17 *La escuela y el estado nuevo, pronunciado por el Excmo. Sr. D. Pedro Sáinz Rodríguez Ministro de Educación en la sesiòn de clausura de los Cursillos de orientaciones nacionales de primera enseñanza*, Burgos, Ministerio de Educacion Nacional, 1938, p. 7: «Este es un deber de todo Estado, el formar maestros, y es un deber preferentísimo del Estado Nuevo que yo quiero realizar […]. Digo que es un deber del Estado, no porque piense que el Estado debe ser el monopolizador de la enseñanza; quiero que quede bien claro, que si el Estado español tiene todo el sentido de las nuevas modalidades de los que llamamos estados totalitarios en el mundo, sabrá conjugar con una doctrina original propia, ese concepto de la autoridad estatal, con las normas de la tradición católica, imprescindible componente de la civilización de nuestro pueblo».

18 Cfr. A. Martínez Rus, *La persecución del libro. Hogueras, infiernos y buenas lectursa (1936-1951)*, Gijón, Trea, 2014.

19 Scrive M. Montero, *Historia de la Asociación Católica Nacional de Propagandistas*, Pamplona, EUNSA, 1993, tomo II, pp. 93-94: «Lo que se pretendía recrear era algo similar al Estado español del Siglo de Oro: una autoridad central fuerte, apoyada en la religión católica como elemento de cohesión social. Si los propagandistas habían saludado con entusiasmo este proyecto cuando era tan sólo una idea más o menos vaga, ahora que empezaba a convertirse en realidad no

sono sia negativi, come il laicismo, la massoneria e l'insegnamento liberale propugnato durante la II repubblica[20], con i suoi antecedenti in particolar modo dalla *Institución Libre de Enseñanza*, sia positivi, grazie al costante riferimento alla dottrina cristiana. Per quanto riguarda l'ideale pedagogico il gesuita si richiamava all'enciclica di Pio XI *Divini Illius Magistri* (1929), la quale indicava la necessità di rinnovare l'azione educativa di istituzioni religiose e politiche nella convinzione che non potesse esserci alcuna educazione autentica che non fosse cristiana, che non si curasse quindi della presenza della divinità nella vita individuale e nella convivenza sociale[21]. Per Herrera i referenti positivi all'interno del panorama internazionale non erano né l'Italia fascista né la Germania da poco nazificata, quanto Olanda, Irlanda, Inghilterra, Stati Uniti e Canada. Per il gesuita tutte queste esperienze sono accomunate dal tentativo di sopperire a ciò che identifica come una grave mancanza nel panorama culturale mondiale, vale a dire la ridotta presenza di giovani di formazione cattolica capaci di influire nelle politiche diversi paesi[22]. Per questa ragione l'attività "propagandista", per Herrera, passava per la riforma del *bachillerato* universitario, la quale, come noto, costituirà non a caso il lascito legislativo di maggior rilevanza del breve ministero di Sainz Rodríguez, il quale avviò anche la successiva discussione circa la riforma universitaria.

1.3 *Fascistizzazione*

L'ideologia fascistizzante di questa istituzione si costituì in particolare a partire da due contributi assai influenti: uno di José Pemartín[23] e l'altro di

le iban a regatear su apoyo ni sus ofrecimientos de collaboración».

[20] *Ibid*., p. 319: «Con la subida de Azaña, Fernando de los Rios, Marcelino Domingo y Domingo Barnés, se puede decir que también la masonería se había enumbrado en las alturas del Poder y en el Ministerio de Instrucción Pública».

[21] Pio XI, *Della cristiana educazione della gioventù. Divini illius magistri*, Padova, Gregoriana, 1929, p. 13: «È dunque di suprema importanza non errare nell'educazione, e non errare nella direzione verso il fine ultimo con il quale tutta l'opera della educazione è intimamente e necessariamente connessa. Infatti, poiché l'educazione consiste essenzialmente nella formazione dell'uomo, quale egli deve essere e come deve comportarsi in questa vita terrena per conseguire il fine sublime per il quale fu creato, è chiaro che, come non può darsi vera educazione che non sia tutta ordinata al fine ultimo, così, nell'ordine presente della Provvidenza […] non può darsi adeguata e perfetta educazione all'infuori dell'educazione cristiana».

[22] Herrera Oria, *Educación de una España nueva*, cit., p. 146 e p. 148: «Esa masa universitaria carece de ideas religiosas sólidas, de las que se derivan el respeto a la autoridad y el amor racional a la patria. Preguntamos: ¿Hay en los centros superiores un número suficiente de intelectuales católicos que tengan ideas claras y precisas en las cuestiones fundamentales del dogma y moral católicos, que conozcan las bases sobre que se asienta la filosofía católica?».

[23] J. Pemartín y Sanjuán, capo del *Servicio Nacional de Enseñanza Superior y Media*, monarchico molto influente nel mondo cattolico come membro della *Acción Española*, nel suo

José López Ibor[24]. Il primo, contro un'eccessiva presenza della chiesa in campo educativo, sostenne la necessità di assegnare all'Università e all'educazione un ruolo di costruzione dell'ideale patriottico. La storia, per esempio:

> Ha de ser la *segunda religión* de los Españoles, sin miedo alguno a idolatrías, puesto que por designio altísimo de Dios, en nuestra España la religión de la Patria se identifica con la religión de la Religión[25].

Costruita attraverso l'uso della retorica di Mussolini, tale definizione della storia patria come «religione della Religione»[26], e la collocazione all'interno del disegno provvidenziale implicavano che la religione cattolica non dovesse, per Pemartín, esaurire l'ambito nel quale si costruiva l'ideologia fondante il nuovo Stato, la quale doveva invece erigersi a dottrina unitaria capace di racchiudere in sé tutti i diversi ambiti nei quali si esprimeva la convivenza politica[27]. Per questo, contrariamente a Herrera, Pemartín riteneva sbagliato fondare istituti religiosi universitari indipendenti da quelli statali, dal momento che la religione avrebbe dovuto integrarsi all'ideologia del Nuovo Stato. Dall'altro lato, la posizione teorica di López Ibor costituì il primo tentativo della di tracciare la storia della grandezza e dell'Università spagnola in un'ottica franchista. Tra la decantata università medievale e la vituperata università razionalistica per López Ibor è possibile concepire una terza via per la nuova cultura: «La Universidad española, si quiere volver a existir con pujanza, quizás mayor que la que tuvo en sus tiempos mejores, tiene que ser imperial»[28]. Così sarebbe possibile «lanzar al mundo un tercer humanismo: un humanismo auténticamente español, totalitario»[29].

influente *¿Qué es lo nuevo?*, egli dedicò un lungo capitolo alla nuova educazione concepita come strumento utile alla costruzione di un «fascismo intensivo», con un sostanziale sincretismo tra insegnamento religioso e patriottico, rappresentato dalla nuova ideologia della storia spagnola. Cfr. A. Sánchez Castro, *Contribución para una sociología del pensamiento reaccionario español previo a la Guerra Civil. Socio-génesis del filósofo nacional-católico José Pemartín (1888-1954)*, «Sociología Histórica», vol. 2, 2013, pp. 181-210.

[24] Membro della commissione per il progetto di riforma universitaria e poi del CSIC, il giovane medico, fondatore della rivista «Norma», frequentava gli ambienti alfonsini della falange spagnola e aveva scritto l'importante *Discurso a los Universitarios Españoles*, Santander, Cultura Española, 1938.

[25] Pemartín, *¿Qué es lo nuevo?*, cit., p. 162.

[26] Il riferimento è i al fascismo inteso come ideologia interiorizzata che Gentile sintetizzò nella formula del fascismo come «l'anima dell'anima» degli italiani. B. Mussolini, *La dottrina del fascismo*, Firenze, Sansoni, 1936 [1932].

[27] Pemartín, *¿Qué es lo nuevo?*, cit., p. 184: «Un Estado totalitario de fondamento Fascista, tiene que exigir necessariamente a sus Médicos, Físicos y Matemáticos, a más de la Cultura específica de su especialidad, la orientación Cultural general de la Nación-Estado: Religiosa y Patriótica. Lo que se exige en el Extranjero hay que exigirlo en España».

[28] J. López Ibor, *Discurso a los Universitarios Españoles*, 1938, pp. 67-68.

[29] *Ibid*.

2. *Un difficile sincretismo*

Queste le diverse posizioni da cui prese avvio il dibattito che, dall'autunno del 1939, si sarebbe preoccupato di definire la natura e funzione dell'Università. Per comprendere quale direzione assunse la politica culturale del primo franchismo tra quelle delineate è necessario rivolgere l'attenzione al nuovo tipo di intellettuale che si stava formando all'interno della nascente Università del regime[30]. Si tratta di un intellettuale bifronte. Da una parte si percepisce investito d'una missione, quella di dare forma ad un progetto politico ancora acerbo con il suo contributo teorico. Dall'altra è impegnato a farsi spazio e legittimarsi in quanto voce ufficiale d'un regime che di lui necessita solo in quanto adeguato ai propri interessi. La funzione ideologica dei nuovi intellettuali viene sintetizzata dallo stesso ministro José Ibáñez Martin in uno dei suoi primi discorsi pubblici, durante l'inaugurazione dell'anno accademico dell'Università di Madrid:

> Empeño del nuevo Estado es precisamente fomentar la investigación española colocándola en la primera lìnea de las preocupaciones y los problemas nacionales. Pero es deber suyo velar por la unidad de la ciencia, coordinarla con las necesidades del país, hacer que redunden las actividades científicas en servicio de la nación e impedir, a la par, que pueden en ningún caso ser instrumento perverso contra los sagrados principios de la Patria[31].

Il ministro, in linea con López Ibor, per definire la futura università parte dal suo passato imperiale e cattolico e dai rappresentanti illustri di una tradizione ispanica che sembra costituire il collante di una nuova comunità intellettuale. Il concetto di *hispanidad*, al centro del discorso del ministro, gioca un ruolo politico strumentale in quanto costituisce il tentativo sincretico di presentare una via spagnola, e allo stesso tempo di esportarla fuori dai confini spagnoli in virtù del richiamo al passato imperiale[32]. Nel suo discorso il ministro identifica l'istruzione universitaria con la politica, in un modello che seguiva le linee guida contenute nella *Carta della Scuola* fascista pubblicata ad inizio di quello stsesso anno dal ministro Bottai[33].

[30] G. Morán, *El maestro en el erial. Ortega y Gasset e la cultura del franquismo*, Barcelona, Tusquets, 1998, p. 98: «Hoy tiende a no verse el carácter de ruptura con el inmediato pasado intelectual que tuvo el franquismo en sus comienzos; quizá la distancia sea el olvido. No es trataba sólo, aunque fueran brutales, de las depuraciones, encarcelamientos y exilios de quien no extuviera dispuesto a aceptar las concepciones ideológicas del nuevo régimen, sino de la inexistencia de neutralidad».

[31] J. Ibáñez Martín, *La Universidad actual ante la cultura hispánica*, Madrid, 1939, p. 34.

[32] Sull'uso strumentale del termine nella retorica franchista, e la sua successiva implementazione dal punto di vista legislativo a partire dal 1940 M. Berbeito Díez, *El Consejo de Hispanidad*, «Espacio, Tiempo y Forma», vol. 2, 1989, pp. 113-137.

[33] G. Bottai, *Carta della Scuola, Dichiarazione XIX*: «L'Università ha per fine di promuovere in un ordine di alta responsabilità politica e morale il progresso della scienza e di fornire la cultura scientifica necessaria per l'esercizio degli uffici e delle professioni». Scrive D. Pasqualini, *Giuseppe Bottai e la Carta della Scuola*, Chieti, Solfanelli, 2013, p. 5: «Il punto di partenza nella

Questo tentativo sincretico di definire il nuovo compito che l'Università era chiamata a svolgere nella società spagnola viene descritto in maniera esemplare dal giurista Isidoro Martín Martinez. Egli vantava un *pedigree* fascista di peso, avendo condotto i suoi studi presso l'Alma Mater bolognese, ma era allo stesso tempo anche assai legato all'ACNdP. L'occasione per esprimere la propria proposta gli fu offerta dall'inaugurazione dell'anno accademico del *Centro de Estudios Universitarios* – istituto sorto proprio da tale associazione all'inizio degli anni trenta – in presenza del ministro. Il testo rivela una fitta intertestualità, sia con riferimenti ad autori divenuti canonici e citati nei testi di Pemartín, Ibor e Herrera, sia al ministro stesso il cui discorso, tenuto all'*Universidad Central* solo la settimana prima, Martín cita assai spesso. La convinzione di Martín Martínez è quella che: «La Universidad puede y debe representar un solidísimo punto de apoyo para el resurgimiento de España»[34] e che lo possa fare solo richiamandosi alle sue tradizioni imperiali, cristiane, rappresentate dalle università di Alcalá, Toledo e, in particolare, delle «piedras doradas en la docta Salamanca»[35]. L'esempio da seguire è quindi tanto il glorioso passato spagnolo – sempre più stereotipato nella ridondante partenogenesi retorica –, costituito dai pensatori della Roma imperiale come Quintiliano Seneca, o Marziale, dai maestri della scuola di Salamanca, dai Re cristiani, dai dotti medievali, da Vives, Balmes, e anche da alcuni istituti esteri, come il Gemelli, già esaltato da Herrera. Tutti questi riferimenti non sono affatto casuali e costituiscono un chiaro tentativo di creazione di un pantheon intellettuale nazionalcattolico in cui tutti potessero riconoscersi. Già non ci si accontenta di chiamare negativamente in causa massoni, capitalisti, rivoluzionari e liberali, in quanto si aspira a realizzare una nuova missione più ambiziosa, per Martín Martinez:

> La primera misión que tiene, pues, que cumplir la Universidad española es la de asentar la unidad de la cultura, forjar un pensamiento diáfanamente católico y hondamente español: la medida de lo universal servido según nuestras modalidades particulares[36].

Il fine è educare moralmente, creare una classe dirigente in grado di socializzare la popolazione, dal momento che l'Università il dovere di formare gli intellettuali e anche quello di educare gli studenti. Infatti: «Al joven universitario

ristrutturazione della scuola nel suo complesso è l'intenzione di trasformare un'istituzione in organo politico di regime, come si evince da gran parte delle dichiarazioni». Sulla relazione tra la *Carta della Scuola* e il panorama educativo spagnolo si veda M. de Puelles Benítez, *Evolución de la educación en España durante el franquismo*, in Ferrer, Ossebanch Sauter e S. Fernández, *História de la educación. Edad Contemporánea*, Madrid, UNED, 2002, pp. 329-349. Più in generale sulla figura di Giuseppe Bottai si veda il recente L. Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, Milano, FrancoAngeli, 2018.

[34] I. Martín Martinez, *Concepto y misiòn de la Universidad. 1939*, Albuquerque, Editorial Ibérica, 1940, p. 15.

[35] *Ibid*., p. 26.

[36] *Ibid*., p. 43.

hay que adiestrarlo en el ejercicio de las virtudes religiosas y sociales»[37]. Tale missione educatrice e socializzante era chiaramente di stampo cattolico, ma doveva essere sempre praticata in un'ottica patriottica, accompagnando teoria e pratica:

> No basta que nuestras Universidades lleven a cabo sus enseñanzas con una escrupolosa adhesión a la verdad del dogma católico. Para que todas nuestras Universidades sean católicas como quiere el Caudillo, no bastaría con la enseñanza de la Religión, sino que resulta imprescindible la práctica de la Religión[38].

Ci si è soffermati su tale scritto perché esso rappresenta un caso evidente di una posizione comune durante questi primissimi anni del regime. Vale a dire il tentativo sincretico di congiungere i riferimenti retorici della falange, fra tutti José Antonio Primo de Rivera, e quelli della tradizione cattolica. È infatti significativo a tal riguardo che sia proprio José Antonio la fonte chiamata a legittimare la costruzione dei *Colegios Mayores*, non sul modello corporativistico italiano bensì su quello religioso del passato imperiale spagnolo; o ancora che si metta in relazione la funzione del SEU con una missione evangelizzatrice, facendosi esplicitamente interpreti delle parole di Franco[39]. Ciò rivela come educazone religiosa e retorica fascista non fossero, in questo periodo, totalmente disgiunte, causando cortocircuiti peculiari, e talvolta antitetici, rispetto ad esempio alla retorica del fascismo italiano[40].

3. *Consolidamento e posizionamento. Analisi della comunità di discorso*

Il testo di Martín Martinez costituisce inoltre l'esempio di un genere, il discorso programmatico, che dalla sfera politica si stava sempre più estendendo a quella intellettuale in virtù della crescente osmosi tra i due ambiti. Un genere assai frequentato in occasione dei discorsi di apertura degli atenei universitari, con elementi di ridondanza e rigida struttura formale[41]. Tali caratteristiche comuni consentono di identificare in questo mezzo espressivo, in sé assai rigido, uno strumento di fatto molto flessibile per comprendere i contorni di

[37] *Ibid.*, p. 55.
[38] *Ibid.*, p. 58.
[39] *Ibid.*
[40] Su queste differenze, riguardanti in particolare il maggiore o minor grado di clericalismo, A. Francesconi, *El lenguaje del franquismo y del fascismo italiano*, «Nómadas. Revista Crítica de Ciencias Sociales y Jurídicas», vol. 22, 2009, pp. 81-97.
[41] Ai saluti alle autorità e alla *captatio benevolentiae* segue il ricordo dei colleghi non più in ruolo, poi l'esplicitazione del modo in cui il discorso si inserisce nel quadro generale degli interessi nazionali, in seguito lo svolgimento del tema, infine il saluto agli studenti e l'augurio all'istituzione universitaria di essere all'altezza di assolvere alle sue funzioni.

questa nascente "comunità di discorso"[42] che sarebbe diventatala nuova classe dirigente del Paese. L'apparente omogeneità di tale comunità è testimoniata dai titoli stessi dei discorsi che, non casualmente, in questo anno di rifondazione, ruotano tutti intorno al tema del ruolo dell'università nella politica nazionale.

Un primo esempio è offerto dal decano della facoltà di lettere e filosofia dell'Università di Murcia, Montero Díaz, destinato l'anno successivo alla prestigiosa *Universidad Central*[43]. Egli pronunciò il proprio discorso inaugurale dal titolo evocativo di *Misión de la Universidad*, con chiari echi orteghiani, a come per esempio il rimando alla necessità di combattere «el viejo liberalismo» e il dovere che l'Università deva compiere in tale momento di crisi, «lograr la salvación de los valores supremos de la vida». Per rispondere con efficacia a tale dovere essa doveva creare «esa minoría humana, rectora y decidente, capaz de proyectar sobre el Estado y el pueblo los resultados de una creatividad constante»[44]. Si attesta in tali discorsi una unità d'intenti, un senso di appartenenza in virtù del reciproco sentirsi parte d'una stessa tradizione culturale, con una martellante reiterazione di nomi e slogan utili a definire concetti e persone facenti parte dell'*ingroup* e dell'*outgroup* della nuova ideologia dominante[45].

Anche a Oviedo, durante l'autunno del 1939, teneva banco il medesimo problema. È qui Teodoro Gonzalo García, professore di diritto politico, a rendere evidente il tentativo di fare dell'Università un autentico laboratorio politico con il fine di costruire una via spagnola al fascismo, come preconizzato da Pemartín. Per farlo anche García mette in evidenza gli antecedenti dottrinali canonici della storia patria (Donoso, Balmes, Vives, Vasquez de Mella,…), condannando l'«eclecticismo político», esaltando la «actitud ética, espiritualista»[46] tipica del

[42] Il termine è tratto da M. Scattola, *Per una epistemologia delle dottrine politiche europee*, in M. Scattola, P. Scotton, *Prima e dopo il Leviatano*, Padova, Cleup, 2014. Sebbene l'autore ritenga che tali comunità costituiscano un fenomeno tipico della prima età moderna, appare possibile adattare il concetto ad altri contesti: «Possiamo chiamare questi raggruppamenti come 'comunità di discorso' in senso proprio perché effettivamente essi sono caratterizzati dalla presenza di una pratica comune di ragionamento, da uno stile unitario di argomentazione o di discussione. La presenza di questo legame comune attraverso il discorso può essere rilevata in tre modi. In primo luogo i membri di ciascuna di queste comunità sono, diremmo oggi, figure omogenee, ossia appartengono allo stesso ceto o al medesimo segmento cetuale. In secondo luogo essi si riconoscono reciprocamente come interlocutori del medesimo discorso, mentre escludono gli estranei dalla loro cerchia, e ciò in modi sia espliciti sia impliciti. Per questo motivo le 'comunità di discorso politico' possono essere facilmente considerate anche come 'comunità di citazione'. In terzo luogo ciascuno di questi gruppi utilizza un ben definito codice linguistico o letterario, caratterizzato da una rigorosa combinazione di forme e di contenuti». *Ibid*., pp. 90-91.

[43] P. Parra Garrigues, *Historial de la Facultad de Filosofía y letras de la Universidad de Madrid*, Madrid, 1956, pp. 306-311.

[44] Montero Díaz, *Misión de la Universidad*, Madrid, 1940, p. 6; e *Ibid*., p. 9.

[45] Sulla struttura di creazione di ideologie attraverso la pratica discorsiva si è fatto uso della utile schematizzazione proposta da T.A. van Dijk, *Ideologie. Discorso e costruzione sociale del pregiudizio*, Roma, Carocci, 2003.

[46] T. Gonzales García, *Discurso Leido en la solemne apertura del curso de 1939*-1940, Oviedo,

fascismo spagnolo che, rispetto a quello italiano, può farsi forte della propria tradizione cattolica.

Anche a Sevilla l'Università del nuovo Stato riapriva i battenti riflettendo su se stessa attraverso le parole del professore della facoltà di scienze Manuel Lora Tamayo, autore durante la guerra civile di *Ideas sobre una ordenaciòn nacional de la investigación científico-tecnica*. Si tratta di un testo che, pur rispondendo agli stessi criteri formali dei precedenti, aggiunge nuovo materiale di riflessione. Esso getta infatti le basi teoriche per la definizione dei compiti degli istituti di ricerca universitari ed extrauniversitari per l'interesse nazionale[47], prendendo spunto dal *Consiglio Nazionale delle Ricerche* sorto in Italia nel 1923, il quale proprio nella seconda metà degli anni trenta aveva avuto una notevole implementazione[48]. Emerge così la preoccupazione di conservare nelle università un centro dell'investigazione scientifica, facendo del futuro CSIC non un organismo totalmente alieno ad esse ma costituito a partire da quelle[49].

Questo costituisce solo uno degli esempi che rendono manifesto come anche all'interno di un genere letterario assai irreggimentato dal punto di vista formale fosse possibile portare alla luce elementi di dibattito che, accettati e condivisi i canoni formali e sostanziali della comunità di appartenenza, aprissero al confronto su alcuni temi specifici nel momento in cui ancora doveva essere ben definita la struttura normativa che avrebbe regolato il funzionamento della comunità stessa, come nel caso del nascente CSIC. In gioco vi era sia l'ordinamento del Nuovo Stato che il destino personale e professionale dei membri della stessa comunità, per cui tali discorsi avevano una duplice funzione: propagandistica, verso l'esterno, e di posizionamento dialogico, verso l'interno.

I punti di frizione vertevano su tre questioni principali: a) l'insegnamento religioso e la sua collocazione o all'interno dei *curricula* universitari: generico complemento formativo, o prerogativa di istituti privati, disciplina a sé stante del sapere; b) la natura "didattica" o "educativa" dell'Università; c) la questione circa il ruolo più o meno rilevante della ricerca scientifica come compito proprio dell'Università. Queste questioni non costituirono un mero scontro retorico, dal momento che si stava ridefinendo il ruolo dell'università nel quadro del nuovo

1939, p. 34.

[47] M. Lora Tamayo, *Discurso Leido en la Solemne apertura del curso Académico de 1939 a 1940 en Sevilla*, Sevilla, 1939.

[48] Sul CNR durante gli anni considerati, M. di Giovanni, *Scienza e potenza. Miti della guerra moderna, istituzioni scientifiche e politica di massa nell'Italia fascista. 1935-1945*, Torino, Zamorani, 2005, pp. 120-145; R. Maiocchi, *Il CNR negli ultimi anni del fascismo*, in P.G. Zunino (ed.), *Università e accademia negli anni del fascismo e del nazismo*, Firenze, Olschki, 2008, pp. 273-298.

[49] M. Lora Tamayo, *Discurso Leido en la Solemne apertura del curso Académico de 1939 a 1940 en Sevilla*, cit., pp. 44-45: «La Universidad ha de hacer buenos profesionales, que nacerán de una enseñanza bien dirigida; pero no hay de olvidar tampoco que tiene en sus manos la formación de los rectores de la Universidad de mañana, que no han de ser meros repetidores de ciencia […]. La Universidad sea la base de los nuevos Centros de Investigación».

ordinamento nazionale. Una questione che non poteva che causare scontri e dibattiti.

4. *La lotta per l'egemonia all'interno della comunità di discorso*

Cultura e politica, università e potere, divennero quindi sinonimi, e la retorica divenne parte del contenuto ideologico del nuovo regime, determinando che tali dibattiti trascendessero i limiti di tale istituzione, riverberandosi direttamente nella politica. La creazione del CSIC e l'adozione dell'*Arbor Scientiae* fondato sulla teologia, costituì una prima ripartizione dei ruoli tra università nazionale, e centro di ricerca religioso. Nel suo discorso alla Pontificia di Salamanca il vescovo Pla y Deniel non nascose la propria soddisfazione per la decisione del ministro. Sostiene il prelato, rivolgendosi al ministro stesso, che:

> Proclamando de nuevo la raíz religiosa de las primeras fuentes de nuestra cultura hacéis converger en la Iglesia española el origen de nuestro florecimiento científico y de la expansión del pensamiento hispánico en el mundo[50].

Simili affermazioni destavano malessere in quanti prefiguravano in quegli anni una società regolata secondo un'ideologia fascista. Le norme programmatiche stabilite dal movimento FET y JONS in materia educativa auspicavano infatti una riforma educativa assai diversa, secondo cui: «La Iglesia y el Estado concordarán sus facultades respectivas, sin que se admita intromisión o actividad alguna que menoscabe la dignidad del Estado o la integridad nacional»[51]. Lo stesso *Instituto de Estudios Políticos*[52], di recente creazione, si vedeva leso nelle sue prerogative alla luce del sempre maggior peso assegnato alle associazioni cattoliche. Si trattava di una vera lotta per il dominio combattuta all'interno di tale comunità intellettuale[53].

Di essa si fece eco l'allora giovanissimo docente di medicina Pedro Laín Entralgo, fondatore con Dioniso Ridruejo della rivista falangista «Escorial».

[50] E. Pla y Deniel, *Discurso en la restauriación de la Pontificia Universidad Eclesiástica Salmanticense*, Salamanca, 1940, p. 10.

[51] È il XXV punto dei *Fundamentos del Nuevo Estado*, Madrid, Vicesectretaria de Educación Popular, 1941.

[52] Sull'IEP cfr. N. Sesma Landrín, *Sociología del Instituto de Estudios Políticos. Un grupo de élite intelectual al servicio del partido único y el estado franquista (1939-1969)*, in M.Á. Ruiz Carnicer (ed.), *Falange. Las culturas políticas del fascismo en la España de Franco (1936-1975)*, Zaragoza, IFC, 2013, pp. 253-288.

[53] G. Alares López, *Escuela de Falange. La pugna por un sistema educativo nacional-sindicalista durante el primer franquismo*, in G. Vicente (ed.), *Historia de la Enseñanza Media en Aragón*, Zaragoza, IFC, 2011, pp. 617-634: «La década de 1940 constituyó el punto de arranque de un intenso debate en torno al modelo educativo, que enfrentó a los sectores más ortodoxos de Falange con los representantes de la enseñanza religiosa» *ibid*., p. 619.

Egli, nel suo *Los valores morales del nacionalsindicalismo* (1941), si presenta con toni pacificatori come «falangista y católico»[54], salvo criticare immediatamente decisioni e retoriche che facevano il primo gruppo subalterno al secondo, tradendo la tradizione nazionale e i presupposti del Nuovo Stato. La necessità di separare Stato e Chiesa viene trattata in questo testo attraverso un riferimento che diventerà canonico in una serie di discorsi politici del movimento, vale a dire il *De Monarchia* di Dante, in particolare il capitolo III, dove si sostiene la dipendenza del re da Dio ma non dalla Chiesa riguardo a decisioni di ordine politico[55]. Due sono i temi centrali di questo scritto: l'insegnamento religioso nell'università e la funzione educativa di tale istituzione. Laín è irremovibile nell'affermare che l'educazione fascista e totalitaria spetta allo Stato, secondo i principi cristiani ma senza intromissioni della Chiesa. Per assolvere a tale funzione educativa egli chiama in causa il partito universitario, il SEU, che attraverso il suo rappresentante nazionale, all'apertura dell'anno accademico a Madrid nell'autunno del 1941 si richiama a sua volta a Laín per sottolineare la necessità di dar vita ad «una Universidad encuadrada en el orden programático del Movimiento»[56], in un gioco di rimandi con il discorso pronunciato di fronte al *Caudillo* l'anno precedente dal leader nazionale José Miguel Guitarte all'inaugurazione dell'anno accademico 1940-41 a Valladolid. In esso si sottolineava come il movimento fosse «la línea continuada de la más pura política falangista»[57] e l'Università dovesse preoccuparsi dell'educazione morale, patriottica, fisica e militare per dar vita ad una comunione cameratesca, non apostolica.

In quella stessa occasione, il 4 Novembre 1940, a Valladolid, non era presente soltanto Franco, ma anche il ministro Ibáñez Martín che colse l'opportunità per tracciare un bilancio del suo primo anno alla guida del Ministero in un discorso dal titolo *Hacia un nuevo orden universitario*. Dato il contesto egli non poté che allinearsi alla retorica del Movimento che allora stava godendo di ottima salute. Sottolineato il carattere rivoluzionario della riforma universitaria, egli rivendicò di aver gettato le basi per la supremazia dei «principios cristianos de una ciencia espanola»[58], però separando nettamente i ruoli tra Stato e Chiesa, e privilegiando il primo di questi due elementi[59]. Un delicato esercizio

[54] P. Laín Entralgo, *Los Valores Morales del Nacionalsindicalismo*, Madrid, Aguirre, 1941, p. 9.

[55] *Ibid*., p. 53.

[56] *Estudio y Accion. Discurso leído por el Jefe Nacional del SEU*, Madrid, 1941, p. 8.

[57] J.M. Guitarte, *Discurso del Jefe Nacional de SEU*, Madrid, 1940, p. 3.

[58] J. Ibáñez Martín, *Hacia un nuevo orden universitario, Discurso pronunciado en la inauguración del curso académico de 1940-41 en la Universidad de Valladolid*, Valladolid, 1940, p. 6.

[59] *Ibid*., p. 17: «En el primer plano de las preocupaciones de un Estado que quiere rehacerse de una catástrofe nacional ha de estar la revolución de los espíritus, porque sin ella los males del desorden y la anarquía vuelven a fermentar, y aun fermentan más facilmente si sólo trata de curárselos con remedios materiales. Esa revolución de los espíritus sólo se alcanza en el campo

di equilibrio che poneva l'Università al centro della preoccupazione nazionale come istituzione gerarchica e militare, al servizio degli interessi patriottici. L'accondiscendenza nei confronti del movimento falangista da parte del ministro – mentre il progressivo processo di fascistizzazione si univa al sempre più stretto vincolo con la politica culturale di Germania e Italia, che si stavano imponendo nel conflitto bellico[60] – si manifestò attraverso la Ley de Bases dell'organizzazione sindacale[61] e, soprattutto, l'organizzazione della Milizia Universitaria[62]. Allo stesso tempo, si assiste alla creazione del *Consejo Nacional de Educación*, sull'esempio degli altri totalitarismi europei[63].

Questo ruolo predominante dell'ala falangista nella cultura nazionale, fu però solo provvisorio, e dettato dalle circostanze storiche interne ed internazionali. Vi era infatti chi non si mostrava soddisfatto per la mancanza di peso assegnato all'associazionismo cattolico, che non si accontentava di esercitare la sua influenza solo di principio, rivendicando di fatto la piena direzione dell'intero sistema educativo[64]. Il ministro cercò di mitigare lo scontento, come testimoniato dal discorso tenuto nell'ottobre del 1941 in occasione della riunione del CSIC. Nell'occasione egli non si limitò a mettere in evidenza il compito di cristianizzazione della cultura realizzato dal Consiglio, ma sottolineò anche l'effettivo supporto dato agli organi religiosi dallo Stato[65]. Questo tentativo trova la sua più esplicita rappresentazione nell'*Anteproyecto* della riforma universitaria, che identificava 5 funzioni chiave per l'Università franchista: a) docente; b) professionalizzante; c) educativa; d) propagandistica; e) di selezione dei quadri dirigenti[66].

A partire da questo momento la già divisa comunità di discorso si riposiziona su una sola questione principale. Il tema della funzione educativa appare infatti non soltanto il punto più rilevante della riforma, come dichiarato dal direttore della rivista Pedro Rocamora e sostenuto dal ministro, ma anche il maggiore terreno di scontro. I numerosi articoli pubblicati sulla «Revista de Educación

de la educación y de la cultura. Por eso, repito, el Nuevo Estado español no puede arrebatear el máximum de los medios necesarios a la reconstrucción y renovación de la Universidad».

60 J. Ibáñez Martín, *La confluencia de las cultura alemanas y hispana*, «Revista de Educación Nacional», vol. 6, 1941, p. 7: «Nunca en la Historia de la Humanidad alcanzaron las armas de un pueblo la gloria difícil que, en estos dos años de lucha, Alemania ha sabido lograr. Pero, como en toda suprema coyuntura histórica, vuestro país supo también forjar, como instrumento indispensable para el triunfo, la estrecha alianza de las armas y de la cultura».

61 BOE 342, 7 Dicembre 1940, pp. 8388-8392.

62 BOE 64, 5 Marzo 1941, pp. 1547-1549.

63 L.E. Otero Carvajal, *La Universidad nacionalcatólica*, in Id., *La Universidad nacionalcatólica. La reacción antimoderna*, cit., pp. 69-130.

64 Sullo scontro tra Chiesa e SEU si veda Sotés Elizalde, *Universidad Franquista: debate sobre la libertad de enseñanza (1930-1962)*, cit., pp. 135-152.

65 J. Ibáñez Martín, *Un año de política docente*, «Revista de Educación Nacional», vol. 10, 1941, pp. 8-10.

66 Italicus, *Ante la riforma universitaria. La docencia, la investigación y la profesionalización*, «Revista de Educación Nacional», vol. 12, 1941, pp. 27-32.

Nacional» tra il 1941 e il 1942 sono assai eloquenti in tal senso e permettono di seguire l'evoluzione del dibattito proprio attraverso il diverso significato che veniva attribuito al termine "educazione". All'egemonia educativa intesa come monopolio dello Stato, sostenuta ad esempio dall'ispettore dell'educazione della *FET y JONS* Gerardo Gavilanes[67], facevano da contraltare gli articoli di Luis Araujo-Costa sul significato cattolico dell'educazione universitaria[68] e gli editoriali di Pedro Rocamora, membro dell'ACNdP, in cui non soltanto si rivendicava il ruolo della religione, unanimemente riconosciuto, come elemento di formazione, ma in cui si sottolinea allo stesso tempo che: «Se ha reconocido […] a la Iglesia la suprema jerarquía que le corresponde en orden a la educación»[69].

Nel corso del 1942, la lotta per l'egemonia sembrava orientarsi a favore del lato cattolico, coincidendo con la defascistizzazione dello Stato che prese avvio per il progressivo indebolimento delle forze dell'Asse, il quale trovò la sua espressione più nota nell'uscita di Serrano Suñer dal governo nell'autunno di quell'anno[70]. Se è vero che nei primi mesi del 1943 si accentuò l'importanza di uomini esterni alla Falange in posti apicali di dirigenza[71], è evidente anche che tale cambiamento fu di fatto preannunciato dalla crescente accentuazione del carattere religioso dell'educazione universitaria nella retorica franchista.

La retorica del regime, apparentemente unitaria e coesa, quando analizzata in dettaglio nasconde in realtà notevoli punti di attrito, di lotta di interessi e di scontro tra distinte ideolgie. Queste divergenze si manifestarono con forza nel momento in cui il *Proyecto* fu discusso dalle rinate *Cortes* il 1 luglio 1943[72]. È in particolare il riconoscimento del carattere ufficiale degli istituti privati e la loro parificazione agli istituti statali universitari a costituire il centro della discordia, rivelando quali fossero gli interessi in gioco dietro alla retorica circa la

[67] G. Gavilanes, *Ensayo sobre una pedagogía nacionalsindicalista*, «Revista de Educación Nacional», vol. 14, 1942, p. 27: «El hecho de exigir toda hegemonía educativa para el Estado permite con el tiempo anular esa masa amorfa que – en lo mejor de los casos –, bien sugestionable, es dirigida a un fin determinado por elementos extraños a la política estatal. Por ello es preciso inflitrar en las nuevas generaciones el sentido y el espíritu de las normas Nacionalsindicalistas, con el propósito de llegar a un resultado medio de defensa de aquél, por un lado, y por otro resolver el problema de los mandos futuros que indudablemente pueden salir de cualquiera de los elementos nacionales».

[68] L. Araujo-Costa, *La razón de jerarquía*, «Revista de Educación Nacional», vol. 12, 1941; Id., *Ismos, Religión verdadera y religión falsa*, «Revista de Educación Nacional», vol. 15, 1942; Id., *La persona de Jesus Cristo y las ciencias de la verdad católica*, «Revista de Educación Nacional», vol. 17, 1942; Id., *El Catolicismo, religión de realidades*, «Revista de Educación Nacional», vol. 20, 1942.

[69] *Editorial*, «Revista de Educación Nacional», vol. 16, 1942, p. 7.

[70] Montero, *Historia de la Asociación Católica Nacional de Propagandistas*, cit., pp. 255-260; Gallego Margalef, *El evangelio fascista. La formación de la cultura polìtica del franquismo (1930-1950)*, cit., pp. 662-665.

[71] A. Ferrary, *Il franquismo*…, cit., p. 208.

[72] Archivo Histórico de las Cortes, *Comisión de Educación Nacional*, 01-VII-1943.

«apostolicidad de la Iglesia». Una questione delicata che ruppe definitivamente la precaria unità della comunità di discorso. Lo stesso dibattito parlamentario lascerà aperta la questione, e si preserverà tale ambiguità anche nel testo conclusivo della legge. Nelle parole di Torres Lopez:

En su dia, si hay alguna ambiguedad u oscuridad […] se podrá esclarecer mediante acuerdos entre ambas supremas Potestades y por eso no debe existir recelo alguno en aceptar una fórmula tan clara: declaración de acceptación de los derechos, sin decir cuáles, que luego en su momento se determinará el valor profesional de los títulos entre ambas supremas Potestates, cada una en su respectiva esfera[73].

Una mancata soluzione criticata dai falangisti, rappresentati in commissione da Tovar e Laín, ma difesa dai rappresentanti del mondo cattolico, e che rivela un processo di creazione ideologica complicato, segnata dallo scontro, dalla mediazione non sempre efficace e pacifica.

Conclusioni. Vincitori e vinti

La *Ley de Reforma Universitaria* promulgata il 29 luglio del 1943 è quindi il punto di arrivo di un dibattito che produsse, a quasi cinque anni dal suo inizio, una lacerazione di questa apparentemente coesa comunità di discorso. La «doble calidad de católicos y de falangistas»[74], non costituiva di fatto una sintesi sempre semplice. Così, nell'anno in cui la retorica della ricostruzione materiale e spirituale della cultura ideologica del regime si fece sempre più forte, anche in ragione dell'inaugurazione della rinnovata *Universidad Central* di Madrid[75], quella stessa comunità si sgretolava. Il nuovo corso risultava evidente dalla retorica del ministro, che usando solgan antichi, apre la porta alla creazione di una nuova comunità, di una nuova classe dirigente:

España está preparando su influencia decisiva en el pensamiento humano. […] No caben posiciones centrales, ni líneas medias, entre España y anti-España. Ofrecemos y pedimos sinceridad. Entre la España que cree y la España que blasfema, no admitimos la zona intermedia, dulzona y traidorzuela, petulante y vacía, de unos entes aislados, que no creen y parece que no blasfeman, pero son escépticos rotundos y blasfemos perfumados[76].

[73] *Ibid*., pp. 5-6, 10.

[74] J. Ibàñez Martìn, *La escuela bajo el signo de Franco*, Madrid, 1943, p. 9.

[75] *La ciudad universitaria. Esquema del trabajo realizado por el Ministerio sobre las ruinas heroicas*, Madrid, s.e., 1943.

[76] J. Ibáñez Martín, *Discurso pronunciado en el cuarto pleno del Consejo superior de Investigaciones cientìficas, Diciembre 1943*, in Id., *La investigación española*, Madrid, Publicaciones Españolas, 1947, tomo I, p. 132.

La nuova Spagna era rappresentata dai membri del *Consejo Nacional de Educación* ricevuti cordialmente a Roma da Pio XII, difensori non solo degli interessi nazionali quanto di quelli dell'intera Chiesa Romana[77]. Lo stesso *Caudillo*, alla fine del 1943 attestava l'avvenuto cambiamento nelle gerarchie del regime nel suo discorso inaugurale all'Univesità di Madrid:

> El Estado se ha sentido, hoy más que nunca, colaborador de la Iglesia en al restauración del orden cristiano y se ha propuesto, a la vez, apoyar su existencia presente y futura en la unidad espiritual de los espanoles, lograda en el campo de la educación[78].

Sarà, di lì a poco, la riunione dei professori cattolici della *Acción Católica* a sancire l'inizio del piano di «conquista de la Universidad» da parte dell'associazione[79]. Sempre più evidente sarà anche la penetrazione delle istituzioni religiose nella legislazione universitaria con una serie di misure volte a riempire quel vuoto normativo che in essa si era deliberatamente voluto conservare[80]. Ne sono prova il decreto sull'educazione religiosa all'interno delle università[81], il riconoscimento del CEU come centro ascritto all'Università di Madrid[82], o la fondazione della *Universidad Internacional Menendez y Pelayo* alle dipendenze del CSIC[83], nel 1945. Dal punto di vista dell'evoluzione della retorica franchista, è prova di ciò la predominanza nel pantheon intellettuale di riferimenti appartenenti alla sfera di influenza cattolica della storia recente,

77 La visita avvenne il 21 Febbraio 1943. Al rientro, il vicepresidente Garcia Siñeriz lesse una lettera del papa. «Al poner reverentes sobre nuestra cabeza y sobre nuestro corazón la bondadosa carta de nuestro Santo Padre, y al recibir su confortante Bendición Apostólica, que extendía a todos los colaboradores del Consejo, vimos en sus palabras y aceptamos como compromiso de honor y como deber de nuestros trabajos, de nustra labor y de nuestra misión, lograr que las buenas doctrinas vayan penetrando cada día con más intensidad, a la vez que con la máxima convicción, en todas las mentes y conciencias». Cfr. Ibáñez Martín, *Discurso pronunciado en el cuarto pleno…*, cit., p. 134.

78 *Discurso pronunciado por S.E. El Jefe del Estado y Caudillo de España en la ciudad universitaria*, Madrid, 1943, p. 5.

79 *Reunión de Profesores para el estudio del Apostolado de la Acción Católica en la Universidad*, Madrid, Acción Católica Española, 1943, p. 2: «La Iglesia nos pide, por boca de su Jefe Supremo, el Vicario de Jesucristo, que penetremos y ejerzamos una saludable influencia en la vida universitaria. ¿Parecerá quizá empresa sobre manera dificil? Lo es, en efecto, y como tal nos la presenta el Papa [….] Pongamos en la Universidad, como lo hace el Papa, la más firme esperanza de un mañana mejor, y en nuestro trabajo apostólico, no sólo la ilusión de un futuro espléndido, sino también la de un presente cargado de frutos».

80 E.N. Marín, *La Universidad en los anos cuarenta: por una cultura unitaria y tradicional*, in Ruiz Carnicer (ed.), *La Universidad española*, cit., p. 345: «Hasta la *Ley de Ordenación Universitaria* y los decretos de ordenación de las Facultades, la Universidad experimentó una etapa de reorganización docente, presidida por un férreo control político encaminado a la consecución de un proyecto de 'recristianización de la cultura española', objetivo primario de Ibáñez Martín».

81 BOE 39, 8 Febbraio 1944, pp. 1106-1107.

82 BOE 208, 27 Luglio 1945, p. 668.

83 BOE 325, 21 Novembre 1945, pp. 3089-3090.

come Menendez y Pelayo[84] o Ramiro de Maeztu[85]; o l'esclusione, dal 1945, della rivista «Ecclesia», rivista ufficiale di *Acción Católica*, dal controllo della censura[86]. A partire da questo momento, il processo di definizione e formazione della classe intellettuale dello Stato franchista, e quindi il consolidamento del suo potere all'interno della società spagnola, sarà sempre più indirizzato verso un'educazione di stampo cattolico, non soltanto per contenuti ma anche per le istituzioni ad essa deputate. La comunità di discorso emergente da questa nuova retorica cambierà natura, senza tuttavia transitare per alcuna mutazione genetica, passando dal tentativo di definire un'equilibrata ideologia nazional-cattolica, ad una sorta di ispano-teocrazia.

Il nuovo umanismo, il quale tale comunità aveva cercato di definire nel corso del quinquennio precedente, si andava quindi declinando nei termini di un dogmatico personalismo cristiano, il quale escludeva gran parte delle tradizioni politiche che avevano cercato di imporsi senza successo durante il periodo precedente. Sarà proprio in ragione di tale esclusione forzata che torneranno alla luce, dalla fine della decade, e in particolare negli anni '50, voci di aperto dissenso nei confronti dell'egemonia culturale cattolica. Si tratterà quindi di un dissenso sorto non, come spesso sostenuto, per la presenza di un'anima liberale all'interno della falange[87], quanto piuttosto per rimettere in discussione quello stesso ordine di cose da cui molti erano stati esclusi, facendo appello in modo polemico a termini estromessi dalla retorica del discorso egemone. Ciò, ancora una volta, si espresse attraverso la creazione di nuove comunità di discorso che sorsero ciclicamente all'interno dell'ambiente universitario. A dimostrazione di come l'Università continuasse ad essere un luogo privilegiato di definizione e lotta per l'egemonia politica nazionale.

[84] J. Neria, *MenendezPelayismo y Ortegafobia*, Santander, Sociedad Menéndez Pelayo, 2000.

[85] J.L. Villacañas, *Ramiro de Maeztu y el ideal de la burguesía en España*, Madrid, Espasa-Calpe, 2000.

[86] F. Sevillano, *Propaganda y medios de comunicación en el franquismo (1936-1951)*, Murcia, PUA, 2003, p. 81.

[87] Quello dell'esistenza di una «falange liberale» costituisce un vero *topos* storiografico affermatosi in primo luogo nell'interpretazione datane dagli stessi protagonisti degli eventi. Come scrive Santos Julía, *La 'Falange liberal' o de cómo la memoria inventa el pasado*, in C. Fernandez, M.A. Hermosilla (edd.), *Autobiografía en España: Un balance*, Madrid, Visor Libros, 2004, p. 127: «Esta invención del sintagma 'Falange liberal' y esta mirada a *Escorial* como paradigma de revista liberal no es de hoy; ni siquiera es de esos productos que se suelen atribuir ahora a la transición. […] Falange liberal es más antiguo; se origina en el último tramo de la dictadura y sus creadores fueron distinguidos filósofos políticos no siempre, aunque sí en algunos casos, procedentes de la filas de Falange, ni del Movimiento». Si tratta di intellettuali che vissero in prima persona tale lotta per l'autoaffermazione, e che proprio per tale ragione «reinterpretaron aquel momento como un momento liberal y se tuvieron a sí mismos como liberales», retroproiettando la loro posizione politica successiva. *Ibid*., p. 140.

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Education in Jesuit boarding schools for nobles in Połock (1772-1820)

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ABSTRACT: The purpose of this article is to present the educational activity of boarding schools for nobles at Jesuit colleges in Russia in the years 1772-1820. The literature lacks studies on this subject, which is why the present article is a contribution to the history of education in the Russian Empire. The authors of the text have based their work on manuscripts from the studied period, leaflets and rarely available studies. They present the activities of boarding schools for nobles in Połock – the central and largest center of Jesuit activity in the Russian Empire. In the course of the analysis, they find that the popularity of Jesuit education in Russia resulted from the fact that it offered a modern, Western-style education program as well as from the financial support for students expressed in the activities of boarding schools for nobles and in scholarships for the most deprived.

EET/TEE KEYWORDS: History of Russia; History of the Jesuit School System; Połock academy; Noble pensions; XVIIIth-XIXth Centuries.

Introduction

In 1569, the Polish-Lithuanian Commonwealth was established, a state resulting from the merger of the Polish Crown and the Grand Duchy of Lithuania, and had one king and one general parliament institution. It was a strongly diversified country in terms of nationality, language, religion, society and culture. From the beginning of its existence, Jesuits, an educated, prosperous and well-organized order of the Roman Catholic Church, played an important role in the educational policy of the Commonwealth. The Jesuits created their

own university in Vilnius and several dozen high schools in the country, many of which also had academic faculties of philosophy and theology. Their education was of great importance and, at the peak of its development, was offered in 67 colleges and included 20,000 male youths, mainly nobles.

After 200 years of the existence of the Polish-Lithuanian Commonwealth, in 1772 three European powers – Austria, Prussia, and Russia – completed the first partition of the state, which then comprised a territory of 733,200 square km with roughly 14 million inhabitants (60% of whom were Polish), including Latin and Greek Catholics, Orthodox, Protestants, and Jews. Russia annexed the eastern lands of the Commonwealth (res publica), which contained roughly 1.3 million inhabitants in total, 900,000 of whom were Catholic (800,000 of Greek rite, and 100,000 Latins). At the moment of the separation from Poland, the Society of Jesus possessed 18 institutions in the territories annexed to Russia: four colleges in Połock (the largest and most important), Vitebsk, Orsha and Dyneburg (modern Daugavpils), two residences in Mogilev and Mścisław, and 12 missionary stations[1].

On 21 July 1773, Pope Clement XIV signed the brief suppressing the Society of Jesus, *Dominus ac Redemptor*. On 16 August, the suppression was executed in Rome, and on 18 August, instructions were sent to all papal nuncios to proceed with the suppression in the territories under their jurisdiction. The news about these events reached Warsaw in September 1773. The dissolution of the Jesuit order in Galicia (a new part of Austria) fell to the nuncio in Vienna, while the question of the suppression in other former Polish-Lithuanian lands became a matter of negotiation with Frederick II and Catherine II. It was because of the First Partition, therefore, that the former Jesuits survived as Jesuits until 1780 in Prussia and 1820 in Russia. They ceased to exist in the Polish-Lithuanian Commonwealth, but they survived for few more years in Prussia and for much longer, until the restoration of their order, in Russia. The fact that Catherine II did not agree to the liquidation of the Jesuits in her country was the result of the co-existence of many factors: she wanted to increase her prestige by demonstrating her independence from the Holy See and other European governments, and at the same time she was convinced that Jesuits could be useful to her in educating young people and calming the mood in the annexed Polish territories[2].

[1] M. Inglot, *The Society of Jesus in the Russian Empire (1772-1820) and the Restoration of the Order*, in R.A. Maryks, J. Wright (edd.), *Jesuit Survival and Restoration. A Global History, 1773-1900*, Leiden-Boston, Brill, 2015, p. 70; A.P. Bieś, *Periodyzacja obecności Towarzystwa Jezusowego na ziemiach polskich. Struktury organizacyjne oraz edukacyjno-oświatowe i pastoralne formy aktywności*; Engl. transl. *The Periodization of the Presence of The Society of Jesus on the Polish Territory. Organisational Structures as well as Educatonal and Pastoral Forms of Activity*, «Studia Paedagogica Ignatiana», vol. 17, 2014, pp. 77 f.

[2] S. Pavone, *Dissentire per sopravvivere. La Compagnia di Gesù in Russia alla fine del Settecento*, in F. Alfieri, C. Ferlan (edd.), *Avventure dell'obbedienza nella Compagnia di Gesù. Teorie e prassi fra XVI e XIX secolo*, Bologna, il Mulino, 2012, p. 200.

In any case, the papal decree was never promulgated in Russia in the manner prescribed by the pope, so it remained without legal force. The Jesuits stayed there, legally continuing the religious life proper to the Society of Jesus. As early as 1780, they opened a novitiate in Połock, which received oral approval from Pope Pius VI[3]. As a result, candidates from various parts of the European continent began to arrive in Belarus, and in addition, many ex-Jesuits from all over Europe expressed their desire to re-join the Society of Jesus. Nonetheless, the Jesuit province in Belarus became multinational. Besides Poles, Lithuanians, and Latvians, there were Jesuits from Germany (41), France (25), Belgium (12), Italy (7), and Switzerland (5). In addition, there was one Jesuit from each of the following countries: England, Dalmatia, Bohemia, Holland, Portugal, and Hungary[4].

Due to the fact that there were many outstanding figures among the Jesuits, the level of education provided by their order in Russia increased significantly. In 1799, the residences of Mogilev and Mścisław were elevated to the rank of colleges. In 1800, the college of St. Petersburg opened; in 1811, the college of Romanów[5] opened; and in 1817, the college of Użwałd opened. The most important scientific and educational center remained the college in Połock: around 174 young people studied there in 1796, and in 1811 – 441[6]. In addition, junior high schools and philosophical studies were run by Jesuits in colleges in Dyneburg, Vitebsk and St. Petersburg; schools up to and including the rhetoric class operated at the colleges in Orsha[7], Mogilev, Mścisław, Romanów and Użwałd, while the lowest junior high classes were run in mission houses in Chachersk, Krasław, Astrakhan, Saratov and Odessa. In 1796, 726 students received education in all schools of the order, while in 1815 there were already about 2,000[8].

In the didactic program, exact sciences were emphasized, and teaching modern languages was introduced, particularly French and German, in all

[3] M. Inglot, *Jezuici w Imperium Rosyjskim (1772-1820) i przywrócenie Towarzystwa Jezusowego (1820)*; Engl. transl. *Jesuits in the Russian Empire (1772-1820) and the Restoration of Jesuit Society (1820)*, «Studia Bobolanum», vol. 1, 2015, p. 27.

[4] I. Kadulska, *The Połock Academy (1812-1820). An Example of the Society of Jesus's Endurance*, in R.A. Maryks, J. Wright (edd.), *Jesuit Survival and Restoration. A Global History, 1773-1900*, Leiden-Boston, Brill, 2015, p. 83.

[5] B. Topij-Stempińska, *Dziedzictwo edukacyjne dziewiętnastowiecznych szkół jezuickich. Gimnazjum w Romanowie na Wołyniu*; Engl. transl. *The Educational Heritage of the 19th Century Jesuit Schools. Junior High School in Romanów in Wolhynia*, in I. Kozimala, A. Królikowska, B. Topij-Stempińska (edd.), *Dziedzictwo Kresów. Kultura-narody-wyznania*, Kraków, Akademia Ignatianum, Wydawnictwo WAM, 2014, pp. 95-106.

[6] *Połock*, in L. Grzebień (ed.), *Encyklopedia wiedzy o jezuitach na ziemiach Polski i Litwy 1564-1995*; Engl. transl. *Encyclopedia of Information of the Jesuits in the Territories of Poland and Lithuania 1564-1995*, Kraków, Wydawnictwo WAM, 1996.

[7] A.P. Bieś, *Jezuickie instytucje edukacyjne w Orszy 1773-1820*; Engl. transl. *Jesuit Educational Institutions in Orsha 1773-1820*, «Studia Paedagogica Ignatiana», vol. 19, n. 3, 2016, pp. 15-34.

[8] Inglot, *Jezuici w Imperium Rosyjskim*, cit., p. 28.

colleges. The language of instruction was initially Latin, but from 1802 it was Russian.

Research problem and literature review

The subject of our interest in this article is the upbringing and education of young people, which took place in the so-called boarding schools for nobles (*Convictus Nobilium*), that existed at every Jesuit college in Russia. In 1805, these structures housed roughly 220 boarders[9]. Presenting all these institutions would go beyond the scope of one article, and besides, many of these boarding schools for nobles had a similar educational program to the one in Połock. Therefore, we decided to choose the main center, namely that of Połock, where poor noble youths were educated in a unique way, because they were provided with serious financial support.

In the current literature on the subject, we are hardly able to find a presentation of boarding schools for nobles operating at Jesuit colleges in Russia. The one exception is the text by Georg Schuppener, who – broadly describing the influence of Jesuit institutions on education in Russia – also takes a closer look at educating noble elites at the college in St. Petersburg, although he only mentions the similar facility in Połock[10].

Jesuit education in Russia has been written about for a long time. In 1867, the Orthodox priest Moroshkin published a two-volume work on the activities of the Jesuits in Russia, and in the second volume he dealt with their education. However, the book is very biased and puts the Jesuits in a very bad light. That being said, it contains some interesting information about the educational initiatives undertaken by the order[11]. In 1922, Marie Joseph Rouët de Journel published a fundamental monograph on Jesuit education in Russia, but focused on the Jesuit college in St. Petersburg[12]. In the case of the facility in Połock, he mainly described the establishment of the Academy. Interest in Jesuits in Russia increased among researchers in the second half of the 20th century. In his 1970 text, James Flynn showed the social and political contexts of the activities of the Jesuits of Russia, but he only discussed the issues of education in passing[13].

[9] Inglot, *The Society of Jesus in the Russian Empire*, cit., p. 74.

[10] G. Schuppener, *Die Jesuiten im Bildungswesen Russlands vom 17. bis zum 19. Jahrhundert*, «Schweizerische Zeitschrift für Religions und Kirchengeschichte», vol. 106, 2012, pp. 585-609.

[11] M. Moroszkin, *Iezuity v Rossii, s carstvovanija Ekateriny II i do nashego vremeni*; Engl. transl. *Jesuits in Russia, from the reign of Catherine II to the present*, 2 vols., St. Petersburg, Tipogr. Vtoraja Otd. Sobstvennoj Ego Imp. Veličestva Kanceljarija, 1867.

[12] M.-J. Rouët de Journel, *La Compagnie de Jésus en Russie. Un Collège de Jésuites a Saint-Pétersbourg 1800-1816*, Paris, Librairie Académique Didier, 1922.

[13] J.T. Flynn, *The Role of the Jesuits in the Politics of Russian Education, 1801-1820*, «The

In a text published in 1976, Daniel Beauvois presented, among other topics, the functioning of the college in Połock, but he did not even mention the local boarding schools, stating only that the parents expected the Jesuits to raise their sons in a conservative spirit[14]. In 1997, Daniel Schlafly presented a study in which he also showed an educational program in a boarding school for nobles, but it was limited to St. Petersburg[15]. A prominent expert on the history of Jesuits in Russia, Marek Inglot, gave the contexts and circumstances of the activities of the Jesuits in Belarus, including in the field of education, but only signaled the existence of boarding schools at Jesuit colleges[16]. Sabina Pavone explored the "strange alliance" between the Russian Empire and the Society of Jesus after the 1773 suppression. She also wrote about the relevance of education and colleges, and undertook a thorough investigation of the period from 1814 to 1820[17]. However, she did not deal with boarding schools for noble youths more closely. The collective work edited by Robert Maryks and Jonathan Wright[18] included two texts on Jesuits in Russia. The author of the first is the aforementioned Marek Inglot, who did not go very far beyond his previous findings in his presentation of the issue, and only briefly mentioned the college in Połock[19]. In the second text by Irena Kadulska, a detailed description of the Połock Academy was made, but the boarding schools working at it were not dealt with at all[20].

Our research on education in boarding schools in Połock is based primarily on the following sources: A. Łabęcki's work *O powrocie Jezuitów i o powszechnym nauczaniu przez nich młodzieży*. [*On the return of the Jesuits and on their universal teaching of young people*], (Warsaw 1805), information contained in the «Miesięcznik Połocki» [«Połock Monthly»], published by the Jesuits in Połock in 1818-1820, *Materiały do dziejów Akademii Połockiej i szkół od niej zależnych* [*Materials for the history of the Połock Academy and schools dependent on it*, presented by J.M. Giżycki and published in Krakow in 1905, and the work of S. Załęski titled *Jezuici w Polsce. Jezuici w Polsce porozbiorowej 1773-1905* [*Jesuits in Poland. Jesuits in post-partition Poland 1773-1905*] (Krakow 1906). We used the historical method applied in educational research.

Catholic Historical Review», vol. 56, 1970, pp. 249-265.

14 D. Beauvois, *Les Jésuites dans l'Empire Russe 1772-1820*, «Dix-Huitième Siècle», vol. 8, 1976, pp. 257-272.

15 D.L. Schlafly, *True to the Ratio Studiorum? Jesuit Colleges in St. Petersburg*, «History of Education Quarterly», vol. 37, 1997, pp. 421-434.

16 M. Inglot, *La Compagnia di Gesù nell'Impero Russo (1772-1820) e la sua parte nella restaurazione generale della Compagnia*, Roma, Editrice Pontificia Università Gregoriana, 1997.

17 S. Pavone, *Una strana alleanza. La Compagnia di Gesù in Russia dal 1772 al 1820*, Napoli, Bibliopolis, 2010.

18 Maryks, Wright, *Jesuit Survival and Restoration*, cit.

19 Inglot, *The Society of Jesus in the Russian Empire*, cit.

20 Kadulska, *The Połock Academy*, cit.

The Jesuit College in Połock

As stated above, the most important center of Jesuit activity in the Russian Empire was Połock. The Jesuits opened their college there in 1580. Four years later, they organized a high school offering three grammar classes and a poetics class. In 1631 they added a class of rhetoric, thanks to which, a few years later, 600 students attended the facility[21]. Information on the college's activity is scarce; it is only known that it was interrupted by numerous epidemics, fires (1633, 1682, 1738, 1750) and wars that destroyed the institution. After the First Partition of Poland, Połock was in Russia, next to the new border with Poland. At that time, the Jesuit college was powerful, with property that consisted of at least 72 villages with 730 houses and 423 houses in Połock alone. The Jesuits owned 5,000 voloks of land (about 250,000 acres), 16,620 subjects in the villages and 289 townspeople[22]. As a result of the partition, half of the foundation estate was in Poland, and after the dissolution of the Society of Jesus it became the property of the Polish state treasury. The Jesuits who remained in the Russian Empire could continue their activities, with one-third of all Jesuits in the Russian territory working in Połock.

In 1786, at the request of Catherine II, the Jesuits reformed their high school in Połock, expanding the curriculum of modern languages and mathematical and physical subjects. The facility became a seven-grade high school, in which philosophy was taught in the sixth grade and theology in the seventh grade.

Contemporaries were very impressed by the education offered at Połock. In 1803, Wasyl Sewergin (1765-1826), a St. Petersburg academician who was an official visitor of the schools in Belarus, spent a week there and praised its facilities, its order, and the knowledge its students demonstrated[23]. The English Jesuit Charles Plowden (1743-1821) wrote, based on reports from Belarus, that the students in Połock «were as well taught as the students were in our best Italian schools»[24].

In 1812, with an imperial ukaz from Alexander I, the college was elevated to the rank of an academy (university)[25]. The solemn inauguration of this

[21] B. Natoński, *Szkolnictwo jezuickie w Polsce w dobie kontrreformacji*; Engl. transl. *Jesuit school system in Poland during the Counter-Reformation*, in J. Paszenda (ed.), *Z dziejów szkolnictwa jezuickiego w Polsce*, Kraków, Wydawnictwo WAM, 1994, pp. 42, 48-49; Grzebień, *Połock*, cit. The number of students in particular years at the high school in Połock can be found in *Poloniae et Lithuaniae historiae et annuae 1561-1621*, ARSI, Pol. 65, f. 115; *Annuae Provinciae Poloniae*, ARSI, Pol. 50, f. 55v; *Historiae Provinciae Lithuaniae*, ARSI, Lith. 42, f. 505.

[22] J.M. Giżycki, *Materiały do dziejów Akademii Połockiej i szkół od niej zależnych*; Engl. transl. *Materials for the history of the Połock Academy and the schools dependent on it*, Kraków, Druk. W.L. Anczyca, 1905, p. 11.

[23] *Ibid*., pp. 24 f.

[24] Schlafly, *True to the Ratio Studiorum?*, cit., p. 356, quotes W.A. James, *Paul I and the Jesuits in Russia*, Ph.D. diss., University of Washington, 1977.

[25] *Pozwolenie na otwarcie Akademii*; Engl. transl. *Permission to open the Academy*, in

institution took place in 1813, together with the promotion of five new doctors of theology. The academy of Połock had three faculties: theology, philosophy of exact sciences, and languages and letters. It had the right to award doctorates in theology, canon law, and civil law. The program of studies, following the will of the government, clearly favored the exact sciences. Before their closure in 1820, the schools of Połock contained roughly 700 students and 39 professors. In its brief history, the academy promoted over 100 doctors[26].

Noble pension in Połock

At the Jesuit college in Połock, there were several dormitories for the youth studying there. The first of these was a boarding school for nobles or a noble pension (*Convictus Nobilium*) founded in the 18th century as an institution for the poor noble youth[27]. These types of facilities have been established since the 16th century at some Jesuit colleges in Europe, including in the Polish-Lithuanian Commonwealth, especially in cities inhabited by a majority of Protestants. The Jesuits wanted to protect their students from contacts with dissidents[28], and besides, Protestant burghers were reluctant to rent homes to Jesuit high school students. Although high school education was completely free, some parents could not afford the costs of maintaining their child in the city, so they willingly used the offer of noble pensions, i.e. free boarding schools, financed by wealthy founders. A student placed in such an institution received free lodging and meals, and it also co-financed the purchase of textbooks and school supplies.

Boarding schools for nobles established at colleges in the Commonwealth were not large (except Braniewo); they usually had a dozen or so residents occupying the building outside the college walls. In the early years of its operation, the noble pension in Połock had four to ten students[29].

Although boarding schools for nobles began to be opened at Jesuit colleges from the end of the 16th century, most of them were established in the Polish-Lithuanian Commonwealth in the 17th and 18th centuries, thanks to special foundations in the form of donated amounts of money, shares in tenements (in the case of the convent in Łęczyca, even in a synagogue – the Foundation

Materiały do dziejów Akademii Połockiej i kolegium jezuitów w Połocku, 1699-1819, ATJKr 1027 XV, pp. 155-158; Inglot, *The Society of Jesus in the Russian Empire*, cit., p. 74.

[26] *Ibid.*

[27] *Memoriał Czerniewicza do generała Czernyszewa w sprawie szkół połockich*; Engl. transl. *Memorial of Czerniewicz to general Czernyszew regarding the Połock schools*, ATJKr 1027 XV, pp. 113-114; ARSI, *Russia 1007 – IV*-2. J.M. Giżycki, *Materiały do dziejów Akademii Połockiej*, p. 19, 22, 29.

[28] J.W. O'Malley, *The First Jesuits*, Cambridge, Mass., Harvard University Press, 1993, p. 229.

[29] *Memoriał Czerniewicza do generała Czernyszewa*, cit., p. 113.

of Primate Teodor Potocki[30]), cities, villages, settlements and estates. Often, boarding schools received relatives from the founder's family first. This was the case in Sandomierz or Kalisz, where Fr. Balcer Czyżewski founded a noble pension for boys from his family in 1640[31].

A noble pension, like all other institutions operating at the Jesuit college, was obviously subordinate to its rector, who delegated two Jesuits to run the function: the so-called regens (a Jesuit father) and vice-regens (a Jesuit father, seminarian or brother). The noble pensions usually had study-bedrooms, a library, a dining room, a kitchen and utility facilities.

When it comes to education, the youth living in those institutions attended a Jesuit high school with other students. This situation only began to change in the mid-18th century, when the Jesuits in Europe and in the Polish-Lithuanian Commonwealth began to open paid nobility colleges (*Collegium Nobilium*) with separate teaching programs, teaching staff and rectors. At that time, six Polish noble pensions (Vilnius, Warsaw, Poznań, Lviv, Lublin and Ostrog) were transformed into paid, independent nobility colleges, and were not for poor but for well-off youths, who often came from the aristocracy[32].

Boarding schools that were not transformed into nobility colleges[33] in the 18th century also began to offer additional school subjects to their pupils, as a complement to the Jesuit high school curriculum. This was the case from 1752 in the noble pensions in Lutsk and Kamieniec Podolski, where the pupils learned German, and in Krosno, where modern languages and geography were taught in the noble pension established in 1766[34]. The total number of boarding schools (*convicti*) reached 18 by 1773; they ranged from the house attached to

[30] *Łęczyca*, in Grzebień (ed.), *Encyklopedia wiedzy o jezuitach*, cit.

[31] *Kalisz*, in Grzebień (ed.), *Encyklopedia wiedzy o jezuitach*, cit.

[32] K. Puchowski, *Jezuickie kolegia szlacheckie Rzeczypospolitej Obojga Narodów. Studium z dziejów edukacji elit*; Engl. transl. *Jesuit Noble Colleges in The First Polish Republic. A Study of The History of Elite Education*, Gdańsk, Wydawnictwo UG, 2007, pp. 239-270.

[33] The *Encyklopedia wiedzy o jezuitach* (*Połock*, cit.) reported that the noble pension in Połock was transformed after 1780 into a college of nobles. However, this is not confirmed in the sources. Perhaps this information is due to the imprecise distinction between a noble pension (*convictus nobilium*) and a college of nobles (*collegium nobilium*), and although the activities of both institutions were similar in some cases, the superior's competences in each institution differed radically: the head of a *convictus nobilium* was the regens, who was subordinate to the rector of the Jesuit college, while the rector of the *collegium nobilium* was completely independent. Even Inglot, an expert on the history of Jesuits in Russia, seems to treat the terms *convictus nobilium* and *collegium nobilium* interchangeably when he writes that «Antoni Soranzo […] was a regens at the Collegium Nobilium in Połock» (M. Inglot, *Z Parmy do Połocka. Jezuici włoscy w drodze na Białoruś na przełomie XVIII i XIX wieku*; Engl. transl. *From Parma to Połock. Italian Jesuits on their way to Belarus at the turn of the 18th and 19th centuries*, in D. Quirini-Popławska, Ł. Burkiewicz (edd.), *Kulturotwórcze i religijne aspekty podróży duchownych*, Kraków, Wydawnictwo WAM, 2014, p. 460.

[34] *Łuck, Kamieniec Podolski, Krosno*, in Grzebień (ed.), *Encyklopedia wiedzy o jezuitach*, cit.

the prestigious Warsaw *Collegium Nobilium* to the modest facilities offered in provincial towns[35].

After the First Partition of Poland and the annexation of Połock to Russia, the function of regens in the local noble pension was performed successively by Father Hieronimus Wichert in 1777, and then by Father Jakub Zaręba, who was also a professor of French, from 1778 until 1801. He was replaced in 1802 by Father Giovanni Antonio Grassi[36], who was also regens in 1804. Then he was replaced by Father Józef Ławrynowicz, who was regens until 1806. After him, the Italian Jesuit Father Antonio Soranzo was appointed to run the institution until 1811. In 1812 the head of the noble pension was French Father Didier Richardot, and then Father Jakob Pierling until 1819. From 1819, the noble pension gained some independence from the main college, and the Jesuits working in it began to form a separate community with their own superior, who was the French Jesuit Father Jean Luis Rozaven, who was also the dean of the theological department of the Połock Academy[37]. Perhaps this was the beginning of the creation of the Collegium Nobilium, which, however, did not occur in the end due to the expulsion of the Jesuits from the Russian Empire.

In the first years of the noble pension, regens and prefects (Jesuit fathers) took care of the pupils, and in later years they were replaced by young seminarians teaching in Jesuit high schools or theology students. Their work usually lasted a year or two. In addition, professors of foreign languages (for example French and German)[38] and secular custodians, also called wardens or pedagogues, found jobs in the convent. Their task was to help pupils with homework, teach them good manners and, if necessary, admonish and punish. In previous centuries, pedagogues were most often students of the oldest classes in high school (rhetoric), and perhaps this was also the case in the Połock noble pension.

The exact number of residents of the facility, i.e. pupils and their valets, is unknown. What is known is that in 1796 there were 38 pupils in the noble pension, and in 1802 there were 30 pupils and 17 servants, despite a moderate maintenance fee being charged in that period, which in 1795 and in 1803 was 100 rubles a year[39]. Until 1807, the *Convictus Nobilium* did not have its own

[35] R. Butterwick-Pawlikowski, *Before and After Suppression. Jesuits and Former Jesuits in the Polish-Lithuanian Commonwealth, c.1750-1795*, in R.A. Maryks, J. Wright (edd.), *Jesuit Survival and Restoration. A Global History, 1773-1900*, Leiden-Boston, Brill, 2015, p. 55.

[36] From 1811 to 1817, Grassi served as the President of Georgetown University and decided to open this Catholic institution to non-Catholic students.

[37] The surnames of the noble pension regens are listed in the Jesuit catalogs from this period (available at <http://sjweb.info/arsi/Catalog-1774.cfm> last access: 28.08.2019).

[38] The custom of employing modern language teachers dates back to the turn of the 18th and 19th centuries. However, it has only been possible since 1807 to distinguish, based on the information contained in the catalogs, Jesuits working in high schools from those who were employed in noble pensions.

[39] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 28; S. Załęski, *Jezuici w Polsce*

building, but was housed in the structure of the Połock college[40]. After the residents were moved to a new building, their number increased to 41, and the following year to 48[41]. The number of *Convictus Nobilium* pupils increased significantly to about 80 after 1815, when a similar institution run by Jesuits in St. Petersburg was closed. The residents of the noble pension attended the Jesuit high school along with its other students, which was a typical solution adopted in other Jesuit institutions, except St. Petersburg, where the noble pension had a separate curriculum and its own professorship. In addition, the boarders in Połock learned Italian, music and *savoir vivre* at the beginning of the 19th century as part of their extracurricular activities. They were tutored by additional teachers[42].

First of all, nobles from Belarus and Lithuania, and even from other former Polish territories, gave their sons to the noble pension. The names of the students indicate that there were also Russians among them, because the sons of almost all the major noble families there were educated in Połock[43].

Everyday life in the Połock noble pension

More information on everyday life in the Połock noble pension can be found in the leaflets issued by the Jesuits at that time regarding the rules of recruitment to the institution. One of them is *Uwiadomienie o konwikcie połockim* [*Information about the Boarding School in Połock*] from the first years of the 19th century[44]. A booklet very similar in content, although slightly more extensive, has been preserved from 1818[45]. Additional information comes from the reports of inspectors such as Wasyl Sewergin who, on behalf of the state authorities, visited the college in Połock.

In the first part of the *Uwiadomienie*, the Jesuits present their educational ideology, stating that for them it is most important to instill a Christian and civil

porozbiorowej. 1773-1905; Engl. transl. *Jesuits in Poland. Jesuits in post-partition Poland 1773-1905*, Kraków, W.L. Anczyc, 1906, Vol. 1, p. 315.

40 J. Bieliński, *Uniwersytet Wileński (1579-1831)*; Engl. transl. *Vilnius University (1579-1831)*, Kraków, 1899-1900, Vol. 1, pp. 259-260.

41 Załęski, *Jezuici w Polsce porozbiorowej*, cit., p. 334.

42 *Ibid*., p. 325.

43 Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 17.

44 The content of the brochure is in the publication: A. Łabęcki, *O powrocie jezuitów. Ksiąszka druga czyli dodatki ciekawe do pierwszey ksiąszki należące z różnych pism zebrane;* Engl. transl. *On the return of the Jesuits. Second book, i.e. interesting additions to the first book, taken from various writings*, Warszawa, 1805, Vol. 2, pp. 234-238.

45 *Uwiadomienie o Konwikcie Połockim Jezuickim*, «Miesięcznik Połocki», 1818, Vol. 2, pp. 208-218.

life among the boarders, because «virtue helps more than any other teaching»[46]. Therefore, educators would put the emphasis on moral education first, and only then intellectual education[47]. The basis of this moral education is the formation of piety, which was carried out in the noble pension through the so-called *Exercises in piety*, which included lectures on the catechism on Saturdays and Sundays, classes in good manners every three months, participation in annual school retreats just before Easter, daily morning and evening prayers with examinations of conscience, daily Mass, confession and Holy Communion once a month.

Parents were informed that the development of their children in the moral and intellectual dimension would take place not only through contact with carefully selected teachers, but also properly selected colleagues from different social strata, of different ages and often different characters who would positively influence them and encourage mutual, healthy competition[48].

In the next part of the *Uwiadomienie*, a school curriculum was presented for each boarder. At high school level, they were to complete the following subjects: catechism, calligraphy, Latin with Polish, Russian, French, German, ancient history (biblical, Assyrian, Persian, Greek and Roman), general and applied geography (historical and contemporary), arithmetic, algebra, geometry, poetics and rhetoric. At the academic level, the boarders studied Latin and Polish literature, Hebrew[49], Greek, Russian, French and German. Then they studied philosophy, that is, logic, metaphysics and ethics (especially natural law and state law), political economy, Roman, state and church law, as well as physics, which traditionally included chemistry, astronomy, zoology, botany and mineralogy. Higher mathematics, both theoretical and applied, i.e. civil and military architecture, was also part of their philosophical studies. The curriculum was complemented by dogmatic and moral theology as well as a study of the Bible[50].

From another document, *Rozporządzenie nauk w szkołach należących do Akademii Połockiej* [*Teaching regulations in the schools that are part of the Połock Academy*], you can learn the distribution of subjects in individual classes, as well as the timetable of classes at the Jesuit school that were attended by all boarders. Lessons were held from 8 to 11, then there was a lunch break, and then classes resumed at 1 and lasted until 4. A different schedule of the day was applicable on Tuesdays and Thursdays when lessons were conducted only until 11, as the afternoon was reserved for 'pleasant arts' (drawing, music, dance, fencing) and calligraphy[51].

46 Łabęcki, *O powrocie jezuitów*, cit., p. 234.
47 *Uwiadomienie o Konwikcie Połockim Jezuickim*, cit., p. 208.
48 *Ibid*., p. 211.
49 Arabic and Syrian were also taught at the Połock Academy.
50 *Uwiadomienie o Konwikcie Połockim Jezuickim*, cit., p. 212.
51 Insert to «Miesięcznik Połocki», vol. 2, 1818.

Students attended grammar classes in the first three years, followed by poetics and rhetoric. The last two years (grades VI and VII) were devoted to studying philosophy and theology. The order of attending and passing individual subjects was fixed, and this was in force throughout the school, as reported to parents in the *Uwiadomienie*[52]. This rule did not apply only to foreign languages and 'pleasant arts'. Interestingly, classes at school began each day with language learning. It was probably dictated by the organization of the whole day, because the students chose the languages they wanted to learn and were divided into smaller groups, but on the other hand it also resulted from the Jesuit belief that in the morning, when the mind is more absorbent, young people will learn foreign languages faster.

In addition to high school education, acquired together with all other Jesuit college students, the residents of the noble pension had their own additional classes in French and German, and willing students also had classes in Italian, drawing, painting, music (playing the chosen instrument), singing, dancing and fencing[53].

The next part of the *Uwiadomienie* set out the boys' age at admission: they had to be at least 8 years old and not over 14. Jesuits were convinced that it was easier to instill a sense of duty in children at an early age, and they would learn the school material faster. The brochure added that only boys who had previously had smallpox could be admitted to the noble pension[54].

In addition to the requirements for the age of boarders and their state of health, the tuition fee was also set – in 1795 and 1803, it was 100 silver rubles per year (in 1818, it had risen to 150 rubles) – and was paid in two installments: by September 15 and at the beginning of March. This fee was intended for lodging, meals, heating, lighting and necessary repairs, as well as for the «decent maintenance of caretakers», a doctor and a watchman. If a boy wanted to have a valet, who took care of his belongings and helped him with dressing and undressing, then his parents paid an additional 20 rubles a year. The valets did not live with the boys, however, but in a separate part of the building with servants.

The Jesuits also informed parents in the brochure that, in addition to the tuition fees, they should send an additional several dozen rubles a year to cover the other costs of their child's stay in the noble pension, which included: the remuneration of teachers of 'pleasant arts', laundries, the purchase of medicines, books and school accessories, and the purchase of clothing and footwear and their repair. The money remaining from this amount was sent back to the parents along with a detailed bill. It was also noted that the amount of money

[52] *Uwiadomienie o Konwikcie Połockim Jezuickim*, cit., pp. 212-213.
[53] *Ibid*., pp. 211-212.
[54] Łabęcki, *O powrocie jezuitów*, cit., p. 235.

paid for the maintenance of the boarder could only be refunded if the boy was removed from the noble pension by its authorities[55].

Parents sending their son to the *Convictus* were to equip him with underwear and everyday items: bedding, a screen[56], «both festive and common clothing», underwear, a dressing gown, a table mat, a basin, a trunk, a brush, scissors, a penknife and books useful for school.

The school year in Połock lasted from September 15 to the end of July, with two two-week holiday breaks for Christmas and Easter. The Jesuits, however, encouraged parents to leave their sons in the noble pension, if possible, during the summer holidays as well, as otherwise the boys would lose the desire to learn and gain «unnecessary freedoms». In addition, during the summer holidays, extra-curricular classes were organized in the noble pension and time was devoted to cultivating personal interests in the field of 'pleasant arts'[57]. All students were expected to return to the noble pension by September 14, before the start of the next school year.

In subsequent fragments of the *Uwiadomienie*, parents were assured that custodians in the noble pension would ensure their pupils had a high level of language skills. This involved daily speaking exercises in the language that would be most needed (which was therefore not Latin, which had been the obligatory language for conversations in Jesuit colleges in previous centuries). In acquiring language proficiency, boarders were trained by Jesuit educators who formed an interesting international group of people who used Western languages as their native language. In 1819, the regens of the noble pension was – as mentioned above – the German Father Jacob Pierling, his deputy was the Frenchman Father Bonaventure Villaume, and the educators were the French seminarian Jean Menet and various fathers studying theology: Antoni Kirkor, Grzegorz Felkierzamb, the Frenchman Maurice Nizard and finally Felipe Sachi, who was born in Moscow, the son of a Frenchman and an Italian.

Language skills were also improved during lunch and dinner, which the boarders ate partly in silence, listening to a book being read aloud by one of them. Superiors corrected any of the lector's mistakes and everyone learned the correct pronunciation in this way. Pupils were encouraged to discuss what they had heard after the reading. Uplifting conversations were also to be conducted during walks and games to acquire skills in dealing with others and to use the knowledge acquired at school and in the church[58].

In the *Uwiadomienie* of 1818, the importance of cooperation with the family in education was emphasized: «parents have the power to admonish and punish their children, and they share this power with caretakers in the noble

[55] *Ibid*., pp. 236-238.

[56] Boarders lived in threes or fours in one room (Giżycki, *Materiały do dziejów Akademii Połockiej*, p. 122) and the screen helped them to maintain some privacy.

[57] *Uwiadomienie o Konwikcie Połockim Jezuickim*, cit., p. 214.

[58] *Ibid*., pp. 213-214.

pension»[59]. Jesuits informed parents that the boarders would have enough space and time to rest from studying and to play games. The institution also took care of proper medical care and meals were adapted to the age and needs of boys (if necessary, a diet was also prescribed by a doctor). The doctor resided in the main college, and there was also a pharmacy. In the *Uwiadomienie*, it was noted that boarders could have all the things that proved their belonging to their social class with them, however any money needed to be deposited with the regens, who would give them pocket money as needed.

In 1818, 73 pupils were in the *Convictus Nobilium*. Usually, they were sons of the Belarussian and Polish nobility, and a few were the sons of university professors from Vilnius or St. Petersburg. According to the memories of Otto Śliżień, who was a student of the noble pension in the years 1816-1820, it appears that Połock had some wooden buildings at the time, but the buildings belonging to the Jesuits were very impressive and built of brick:

> a large church with two very high towers and with them a significant part of the monastery […], opposite the church, two long, two-story brick houses, which housed school and academic halls[60].

Śliżeń brings up that admission to the noble pension was very solemn. All boarders and their parents were invited to the main hall during afternoon tea. Regens gave a speech and then encouraged those present to help themselves at the table filled with sweets, dried fruit, fruit and wine, which – interestingly – was also served to boarders, although in smaller glasses[61]. It had to have been an unusually splendid party and left an unforgettable impression, since it was recalled in a diary many years later.

We learn from memoirs that the day at the noble pension in Połock was determined by meal times. In the morning the bell called pupils to breakfast, which usually consisted of rye bread and a plate of mulled beer with grated cheese. At one o'clock, a five-course lunch was served, and at five o'clock, afternoon tea was served, consisting of a roll and some sort of drink, often beer. In the evening, the bell called pupils to a four-course dinner. The memoirist points out that the remains from the table were passed on to the poor.

The time between meals was filled mainly with school education and extracurricular activities. Boarders could deepen their knowledge gained at school thanks to various types of exhibits in the so-called museums located in the college. In Połock, according to Śliżeń, there were two or three halls in which various physical machines, chemical instruments, a large telescope, stuffed animals and birds, and musical instruments, even those that the author

[59] *Ibid*., p. 215.

[60] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 121; Kadulska, *The Połock Akademy*, cit., p. 98.

[61] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 123.

could not recognize, were placed. In addition, oil paintings hung in the college corridors and in the church[62]. In this way, young people staying in noble pension had contact with art every day.

Rewards and punishments were also included in the everyday school routine. However, as Śliżeń notes, the Jesuits rarely used corporal punishment. Admittedly, as the memoirist points out, the Jesuits carried with them «on a short stem a rod made of five thick strings connected with thick, rigid ends, but they used it mainly to scratch on their own backs»[63]. Sometimes they used the rod to threaten naughty students or to «hit someone on the hand». While the Śliżień brothers were in the noble pension, no one was punished, and Otto himself also somehow avoided punishment.

The school life of the pupils was varied with trips out of town: «in warm months, they went to a Jesuit farm called Spas[64] located about one kilometer away». They could rest there, relax, and have a meal. In addition, everyday life was diversified by visits by various important guests.

The colorful descriptions of life in the noble pension made by Śli1eń allow us to learn about the organization of the boarding school day and the names of its superiors, educators, caretakers, teachers and boarders. The author of the diary also informs us about the later life stories of some of his colleagues. The names he quotes allow a partial recognition of the personal status of the noble pension's pupils. And so, among the boarders, alongside the Śliżeń brothers, were Justyn and Józef Karnicki, Stanisław and Mikołaj Szadurski, Kajetan and Jan Obuchowicz, Kajetan and Ludwik Oskierka (from Wołyń), Karol and Walenty Wańkowicz[65], Maurycy Buczyński, Emil Oskierka, Arkadiusz Roszkowski, Jan Szczyt, and Dominik Korbutt, in addition to other students whose first names are unknown: Tyszyński, Hłasko, Zaleski, Swołyński, Mężyński, Sielawa, Łuczko, and Podberski, as well as the brothers Bohomolec, Makowiecki, Bogucki, Chełchowski, Jacynów, Kostiow, Świętorzecki, Korsak, Szyrynow, Witkowski, Lipski, and Stępkowski[66].

Those names of boarders do not constitute a full list of residents of the noble pension in Połock, but additional information regarding their places of residence and the positions held by their parent(s) allow for their accurate identification and a description of the subsequent social, political and cultural activities of the graduates. Such a task, however, goes beyond the scope of this article, but it is an interesting research postulate.

62 *Ibid*., pp. 127-129.
63 *Ibid*.
64 *Ibid*., p. 129.
65 Z. Ciechanowska, *Malarz sprawy Walenty Wańkowicz (życiorys)*; Engl. transl. *Walenty Wańkowicz – painter of the important issue (biography)*, «Pamiętnik Literacki», vol. 38, 1948, pp. 429-475.
66 Gi1ycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 124.

«Second seminary» in Połock for poor nobility

In addition to the noble pension, Jesuits led a "second seminary" or "institute" in Połock, a kind of dormitory for the poor nobility. Its beginnings date back to the 16th century. At least six boarders who were studying at the Jesuit high school were supported by college money. The residents of the "second seminary" were provided not only with lodging and meals, but also heating, books and, if necessary, clothing and medical care[67]. The fact that all of these costs were covered by the Jesuits, and not an external founder, was a rare solution used by the Society of Jesus.

The inhabitants of the seminary were looked after by the prefect, who was a Jesuit priest and later a seminarian. In the 19th century, this function was performed by Józef Cytowicz (1799-1802), Florian Bobrowski (prefect in 1802-1803) and Jakub Zaręba (1803-1804 and 1808-1809)[68]. The prefect had two lay helpers, who were tutors, analogous to the custodians in the noble pension[69].

After 1773, there were usually 10 to 12 students in the seminary[70], but by 1802 there were already 24. The boys attended high school classes: from infima to rhetoric[71]. Because the Polish nobility felt the effects of Napoleon's lost war with Russia and became very impoverished at that time, the Jesuits decided to support more students at the seminar with their own money. In 1817 there were 33 of them[72].

According to the historical descriptions that have been preserved,

67 At the time of the suppression of the Society of Jesus in 1773, *Memoriał Czerniewicza do generała Czernyszewa*, p. 113.

68 Information based on Jesuit catalogs (available at <http://sjweb.info/arsi/Catalog-1774.cfm> last access: 28.08.2019).

69 ARSI, Russia 1007-IV-2; ATJKr 1027 XV, p. 113; *Krótka wiadomość o mieście Połocku*; Engl. transl. *Short news about the city of Połock*, «Miesięcznik Połocki», vol. 1, 1818, pp. 178-179; Giżycki, *Materiały do dziejów Akademii Połockiej*, p. 68.

70 On April 3, 1788, the vicar general of the order, Father Gabriel Lenkiewicz, informed the governor general of Mogilev and Połock Piotr Passk about the opening of boarding school for poor nobles (ARSI, Russ. 1015, p. 138), but he was probably thinking of transferring the institution to a new building.

71 Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 19, 22, pp. 27-28; Załęski, *Jezuici w Polsce porozbiorowej*, cit., p. 315.

72 *Opisanie kolegium połockich jezuitów w powszechności. Akt lustracji Kościoła i Akademii Jezuitów Połockich z całym ich funduszem… [przez] ks. Antoniego Majewskiego… 26 VIII – 19 IX 1817*; Engl. transl. *A description of the Jesuit college of Połock in general. Act of inspection of the Church and the Jesuit Academy of Połock with all their funds … [by] Fr. Antoni Majewski … 26 VIII - 19 IX 1817*, in M. Radwan, *Repetytorium wizytacji kościołów i klasztorów w archiwach Petersburskiego Kolegium Duchownego (1797-1914)*, Lublin, Instytut Europy Środkowo-Wschodniej, 1998, pp. 172-173; *Opisy i inwentarze Kolegium Połockiego skreślone w styczniu 1820 roku*; Engl. transl. *Description and Inventory of the Połock College prepared in January 1820*, ATJKr 1326, p. 63.

the seminarians' flats were located in a two-story tenement house with double internal stairs, vestibules and eight rooms on both floors, five rooms with wooden floors and two rooms with a simple floor. On both floors, there were 14 larger windows and 2 smaller ones. There were 8 doors with locks and 2 without locks. The dining room was in the college[73].

In the years 1817-1819, there were changes in the location of the "second seminary": it was moved to a tenement house opposite the Jesuit church. There were 21 boarders at the time. The archive documents contain a description of the building from 1820:

In the second building there is a boarding house for the poor nobility, who pay a very low fee. The institution has a caretaker, chef and servant, paid by the college. Residents occupy the first floor with five rooms, kitchen, pantry and hallways. In all rooms are doors with iron locks, brick floors, Swedish brick ovens, and a standard oven in the kitchen. There are two windows in each of four rooms, one in the fifth, two in the kitchen, one in the pantry, one in the hallways. The entire first floor is whitewashed[74].

It is probable that the financial situation of the Jesuits deteriorated, and therefore they decided to move the 'second seminary' to another, less comfortable building, which, according to the preserved document, was cheaper to maintain.

Hylzen-Szadurski boarding school in Połock

In addition to the two care and educational institutions mentioned above, Hylzen-Szadurski boarding school operated in Połock in 1796-1811, paid for from a special fund named after Józef Hylzen[75] and the executor of his will, Józef Szadurski. Jesuits supported not only this boarding school from the fund, but also a dozen or so other students of their school, granting them scholarships of several dozen rubles a year[76].

Wasyl Sewergin's post-visit reports from 1803 show that there were 55 students in the Hylzen-Szadurski boarding house. They were divided into three groups: the first group of 33 students received a scholarship of 80 rubles a year. Three lay caretakers looked after these boarders. The second group consisted of 10 boys under the care of one custodian. They received 65 rubles a year. The poorest students belonged to the third group. There were 12 of them, and

[73] *Opisanie kolegium połockich jezuitów w powszechności*, cit., pp. 172-173; *Opisy i inwentarze*, ATJKr 1326, p. 63.

[74] *Opisy i inwentarze*, ATJKr rkps 1326, pp. 65-66.

[75] Józef Hylzen (1736-1796) was a wealthy Polish magnate who died childless. He allocated a significant portion of his property to educating the poor nobility (E. Rostworowski, "Józef Jerzy Hyzlen", iPSB [Online Polish Biographical Dictionary], available at <http://www.ipsb.nina.gov.pl/a/biografia/jozef-jerzy-hylzen> (last access: 28.08.2019).

[76] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 23.

they received 50 rubles a year. Every year, a sum of 3,890 rubles for the care and education of boarders was paid for by the Hylzen-Szadurski fund[77]. In the following years, the number of scholarship holders increased, and in 1805 there were already 67[78]. Two years later, their number was 68[79], and in 1808 – 62[80]. In the last year of the boarding school's operation, in 1811, 50 students were supported by the fund[81].

Music seminary in Połock

Another type of boarding school that housed the youth studying at the Jesuit College in Połock was the music seminary (*bursa musicorum*) that taught prospective singers and musicians, usually from poor townsfolk or impoverished noble families[82]. Jesuits organized such institutions from the beginnings of the 17th century at almost all their colleges in the Commonwealth. Music seminaries were autonomous, self-financing institutions, albeit dependent on the colleges and their rectors. Their students took part in services and Masses in Jesuit churches, performed as singers and instrumentalists in Jesuit college theaters and other churches of the town and, not infrequently, were invited to grace family celebrations, such as births, weddings and funerals, in the households of affluent gentry and burghers. The students were reimbursed for their contributions to those activities.

As a rule, students stayed at the music seminary for no longer than 10 years. One third of the residents, referred to as *inscripti*, learned to sing and play instruments; another third, called *respectivi*, paid for their studies by playing in the band and teaching younger boys; and the remaining residents – genuine professionals, called *salariati* as they were contracted employees – played in the band and gave regular instruction in singing and playing instruments. Importantly, the youngsters at the music seminary also received comprehensive general schooling. That is why the daily schedule at the seminary was adjusted

[77] *Ibid*., p. 23, 25.

[78] ATJKr, rkps 845 II, p. 103; Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 27.

[79] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 29; Załęski, *Jezuici w Polsce porozbiorowej*, cit., p. 318.

[80] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 29; Załęski, *Jezuici w Polsce porozbiorowej*, cit., pp. 316-318.

[81] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 26 (raporty Czartoryskich). Following the decision of Józef Szadurski, the scholarship was transferred to Dominican schools in Zabiały (Vitebsk Governorate). Then, in 1835, Ignacy Szadurski decided to transfer funds to the gymnasium in Vitebsk (Załęski, *Jezuici w Polsce porozbiorowej*, cit., pp. 316-317).

[82] J. Kochanowicz, *Geneza, organizacja i działalność jezuickich burs muzycznych*; Engl. transl. *Foundation, structure and endeavors of the Jesuit music seminaries*, Kraków, Wydawnictwo WAM, 2002.

to the college's lesson timetable. The daily agenda provided sufficient time for studies and a time for rest.

The music seminary in Połock was established in the first half of the 17th century[83]. From the beginning it was housed in a separate building, and although it was occasionally completely destroyed (in 1643, 1738 and 1750 in fires, and in 1701 as a result of war hostilities), it was quickly rebuilt. The music seminary in Połock was relatively large, because in 1642 it had as many as 32 musicians who attended the local Jesuit high school and who also played and sang in the Jesuit church, at school, in the theater, as well as during religious ceremonies in the city. Although music seminaries were usually largely self-financing institutions, the Połock seminary was maintained by the college. Its residents received lodging, meals, food, clothing, teaching aids and masters who taught them music from the Jesuits[84].

In 1807, the *bursa musicorum* had 16 boys, maintained by the college[85], and 10 years later, 27, of whom 20 learned to play instruments and attended high school. At that time the facility was perfectly equipped with musical instruments, and the Jesuit church was famous for the good music that was performed by the seminary pupils, who were also students of the Academy[86].

Other forms of financial support for students in Połock

In addition to offering places in the above-mentioned boarding houses and seminaries, in the last years of their stay in Połock, i.e. after 1816, the Jesuits also cared for the very poor students of their school. There were about 150 of them, of whom 100 were called "paupers".

They were poor orphans or children of begging parents; the Jesuits used them for various services and also taught them in their school together with other students[87].

The elders were called seminarians. According to Otto Śliżeń, they wore long green uniforms, girded with black stripes. They maintained order in the church and in the sacristy, and served at the mass. In addition, everyone took part in school activities together with other students.

[83] Id., *Słownik geograficzny jezuickich burs muzycznych*; Engl. transl. *Geographic dictionary of Jesuit music seminaries*, Kraków, Wydawnictwo WAM, 2002, pp. 180-185.

[84] ARSI, Lit. 39, f. 14v.

[85] Inspector Ludwik Broel-Plater wrote about it (cf. Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 28).

[86] *Opisanie kolegium połockich jezuitów w powszechności*, cit., p. 173.

[87] Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 126.

In addition, the College, and later the Połock Academy, had special funds to support students that stayed in lodgings, i.e. outside the boarding houses and seminaries. In 1818, 67 such poor pupils were financed by the Jesuits. The author of the text in *Miesięcznik Połocki* reported that

> the college provides daily bread and food for noble children who do not have the means to support themselves. The Jesuits give them all the books they need to learn and clothes for those most in need. There are 60 to 80 of them[88].

Therefore, the vast majority of students in Połock benefited from various forms of help from the Society of Jesus. Not only food and clothing were given to them, but caretakers were also provided. They taught young boys how to read and write and in this way prepared them for their high school studies.

Schools run by Jesuits in Połock enjoyed great interest not only because of the high level of education, but also because many students were offered various kinds of help. In 1807, the Jesuits supported 172 boys, using various funds[89]. According to a report from a visit made in 1807 by Ludwik Broel-Plater, 327 students were studying at the college, of whom 311 came from the nobility, 12 from the middle class, and four were sons of Greek Catholic priests[90]. Over half of them were supported by the Jesuit college.

Conclusions

The Jesuits founded boarding schools for nobles at all the colleges they ran in Russia (in Połock, Vitebsk, Mogilev, Mścisław, Orsha, Dyneburg, St. Petersburg, Romanów and Użwałd). A closer look at the activities of these facilities would be an important and interesting research task. In addition to colleges, which primarily pursued educational goals, the Jesuits ran mission houses in Russia at various times, in which various schools (from grades two to five) operated, gathering a total of about 1,000 students. Importantly, most of these schools also had various forms of boarding houses: in the mission station in Chachersk (belonging to the college in Mogilev), there were eight boarders in 1806; in the residence in Krasław in 1811, 12 students of the local high school received financing from the Hylzen fund; in the Riga residence, apart from the noble pension for male youth, there was a completely unique institution – a boarding school for girls from impoverished nobility, who studied at the local women's school; and a small boarding house existed from 1807 at the Jesuit

[88] «Miesięcznik Połocki», vol. 1, 1818, p. 179.

[89] Załęski, *Jezuici w Polsce porozbiorowej*, cit., p. 317; Giżycki, *Materiały do dziejów Akademii Połockiej*, cit., p. 28.

[90] *Ibid*.

mission house in Astrakhan, and while there are no indications about similar facilities in the two mission houses in Odessa and in Saratov, they undoubtedly ran schools.

This rapidly developing Jesuit education in Russia received a powerful blow from Tsar Alexander I, who – although initially favorable towards the Jesuits – decided to remove the Jesuits from all over Russia in March 1820 and strictly forbade their return. It was the result of the growing dislike of the Jesuits, which gained strength at the time of the recognition of the Society of Jesus by Rome (1801), which caused the Jesuits to be perceived by the Tsar as a foreign object in the Russian body. Gradually – as Sabina Pavone aptly put it – there was a kind of change of alliances: Jesuits, who in the 1770s allied with the Russian government against Rome's decision to dissolve them, became close to Rome in the second decade of the 19th century, and thus they remained identified as representatives of Roman interest, and, as a result, were expelled from Russia[91].

The popularity of Jesuit education in less than half a century of activity in Russia was conditioned by various factors, which many researchers have pointed out (such as Inglot, Pavone, and Schuppener). From our perspective, in which we tried to show the activity of boarding schools for nobles organized at Jesuit colleges, one can point to an important educational and social factor: in Połock and other centers, the Jesuits created not only the opportunity for young people from noble families to get free education, but they also offered many of them the entire system of multi-faceted financial support made available for the activities of boarding schools and in scholarships.

91 Pavone, *Dissentire per sopravvivere*, cit., pp. 223 ff.

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National anthems: voices of the past and feelings of the present

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ABSTRACT: National anthems express a model of national identity that is revealed through the content of their lyrics. As symbols, they can perform various functions, among which we highlight politics and education. The purpose of this article is to interpret national anthems from a socio-educational point of view and from an ethnic nationalism in order to facilitate the understanding of the construction of national identities and to deduce the persistence of certain themes and their xenophobic and excluding consequences. For this, we will link the content of the European national anthems with the principles of ethnic nationalisms, which is the context in which they make sense.

EET/TEE KEYWORDS: National anthems; Symbols; History of education; National identity; Europe; XIXth-XXth Centuries.

Introduction

This analysis of national anthems is not intended to open Pandora's Box and, like her, to release all the ills that affect humanity. Nor to lock away the only good that the gods had introduced into it: hope. For some, specifically for anti-nationalists, nationalism is the origin of all political and social ills. Hence, from a humanist perspective, there are those who defend a global community

model, a cosmopolitan citizenship, while others defend a revolutionary anti-nationalism from a socialist, communist or anarchist perspective. Neither do we pretend to lose hope in a more world more just and with greater solidarity, a world in which Human Rights are the hope for most of humanity.

There are national anthems that transcend nationalist or national borders. This is the case, for example, with La Marseillaise, considered as the universal symbol of a humanity without chains and identified with the revolutionary struggle and freedom of peoples. The Marseillaise merges in it patriotism, freedom and solemnity. Something similar has also happened with International, a reference symbol of the workers' movement and also claimed by most socialist and communist parties. Others represent a community of nations like the anthem of the European Union, which comes from the *Ode to Joy* written by Schiller in 1785 and composed by Ludwig van Beethoven for his Ninth Symphony, officially adopted in 1985 without lyrics and celebrating the values shared by the nations that make up the Union. National anthems not directly related to national identities are outside the scope of this study.

It is also not the purpose of this research to explain nationalism, but to reflect on one of its symbols, national anthems, because they are part of the rituals of commemorations and celebrations of the homeland and popular festive culture; because they express a model of national identity in which they simultaneously integrate and exclude; because they contain multiple functions, among which we highlight politics and education; because they channel emotions, express values, their staging responds to a liturgy with solemn, military and sacred components, in short because their multiple aspects transmit hope in the future of their respective nations.

In this sense, we consider that the analysis of their lyrics is a source of study that sheds light on many questions such as: do they imply or contain hatred? Do they provide values that help the integration of peoples? Do they promote ethnic plurality or, on the contrary, exclude those who do not belong to the dominant group? Do the lyrics of national anthems tend to allude to a degrading, ignominious past and to a future based on freedom and peace? Is the path between the past and the future saturated by wars? Do they instill a common project full of emotions? Are national anthems expressions of the dominant culture of each nation or, on the contrary, was that so in their time, have they been settled upon uncritically and are they accepted as symbols of a people?

The aim of this research is to interpret national anthems from a socio-educational point of view and from that of ethnic nationalism, in order to facilitate the understanding of the construction of national identities and deduce the persistence of topics and their xenophobic and excluding consequences.

As Pierre Nora said[1], national anthems are part of national symbols such as characters, places, events, flags, armies, parliaments, institutions, constitutions,

[1] P. Nora, *Les lieux de mèmoire*, Paris, Gallimard, 1997.

etc. National identities are constructed with ideas, with principles, with beliefs, articulated around a group of people settled in a territory that share a common culture, but also with symbols as resources that help the foundation of a collective identity that contain a vision of themselves and of other peoples, their values and common feelings that identify them. Symbols have been used as tools for the promotion of cohesion and feedback for national identity.

The study is divided into two sections: firstly, national anthems are reflected on as symbols of national identity that urge citizens to participate actively in order to develop common ideals and values. To do this, their origins are analyzed as a cultural construction; they are related to national integration, considering them as signs of social cohesion that inculcate patriotic values. Their communal liturgy is revealed and the warmongering language and the religious links that are found in a large number of national anthems are briefly analysed. Second, their educational and political functions are examined. Finally, the work concludes with some reflections related to the objective and to the questions formulated previously.

In particular, reference will be made, fundamentally, to the lyrics of the 49 European national anthems. For this purpose, we noted the number of times a total of 466 words was used, choosing them after analysing each of them. We discarded those words whose number of total repetitions was equal to or less than five and finally, those groups of words that fit the content of this study were selected.

1. *National anthems, symbols of nationalist identity*

Generally, national anthems, like the rest of the symbols, were created after the proclamation of national independence and, as Anne-Marie Thiesse affirms[2], also referring to national flags, they serve to identify a country clearly and constantly in the national and international space.

1.1 *Origin*

National anthems are usually written at the birth of nations. In times of conflict characterized by warlike confrontations either against an external force that is considered invasive (international wars), or between different political factions (civil wars), the victorious groups impose their constituent

[2] A.M. Thiesse, *La creación de las identidades nacionales. Europa: siglos XVIII-XX*, Madrid, Ézaro, 2010.

principles of the State, design a national model and, at the same time, they build their symbols. In this sense, conflicts and violence are directly related to the construction of modern states and the development of contemporary citizenships. National symbols are a manifestation and a reference of cultural, social and political movements, some of them not without controversy in their origins[3]. Often, agreements between different concepts of nation have been necessary for there to be consensus regarding symbols. Although they may be subject to change, however, they tend to remain over time, because they are the result of debates and agreements in some cases, or impositions in others between different political and social forces.

National anthems are an expression of emerging social movements, of incipient nationalisms that do not tend to evolve, but become fixed in their historical past, which obviously no longer exists, but which are part of the roots of the present. The national anthem persists already out of context, as a symbol of a time past. They have the origin they have, if they settle and become symbols, they have a meaning that relates them to demands for the unity of a people, their possibilities and their freedoms. One of the functions of culture is social reproduction. Symbolic domination is part of the culture and it entails a political domination that controls and imposes[4].

As cultural constructions, symbols are not exempt from controversy and, at times, they are also the source of conflicts between citizens of the same nation because of the different interpretations that can be made of them, which in turn generates different emotions. Although they enjoy stability and durability, they are not considered sacred and untouchable by modern democracies. Freedom of expression allows a critical analysis, limited by the laws of each country. However, in dictatorial regimes, possible criticism is not authorized. The processes of national development are not closed, on the contrary, they are in constant evolution, they are dynamic so the symbols must be reinvented, updated and constantly assumed by the socio-cultural context[5]. However, national anthems are often rooted in a historical immobility. Precisely for this reason, they demand a historical-educational project that interprets and explains them.

As Hobsbawm states, «Nations do not make states and nationalisms, but the other way around»[6]. The development of nationalisms entailed a strengthening of the symbols through which patriotic feelings were channeled. Music also became part of the so-called national soul or being within an essentialist identity.

[3] J. Moreno Lusón, X.M. Núñez Seixas, *Los colores de la patria. Símbolos nacionales en la España contemporánea*, Madrid, Tecnos, 2017.

[4] I. Marqués de Perales, *Génesis de la teoría social de Pierre Bourdieu*, Madrid, Centro de Investigaciones Sociológicas, 2018.

[5] M. García-Pelayo, *Mitos y símbolos políticos*, in *Obras completas*, 2 vols., Madrid, Centro de Estudios Constitucionales, 1991, Vol. 1, pp. 907-1031.

[6] E. Hobsbawm, *Naciones y nacionalismos desde 1780*, Barcelona, Crítica, 1992, p. 10.

Music played an important role in the creation and formation of the public sphere. It became a symbol of national identity and became part of the institutionalization of national discourses. Never before have music and politics been so linked and music never had so much impact as in nineteenth-century political-social events[7].

The development of a national identity has been nourished by a series of traditional elements such as language, history, customs, rituals, festivals, and music. Music constitutes an element of public education. In addition to being a national symbol, in the nineteenth century it also formed part of the political liturgy forming a binomial that mutually reinforced each other: anthem-national political formation.

1.2 *Relationship with nationalism*

The resurgence of nationalisms, generally, occurred throughout the nineteenth century, but emerged more prominently at the end of that century and in the early twentieth century and involved a flowering of its symbols. The rivalry between nations was an ideal breeding ground for the prosperity of collective images that had national symbols as an external manifestation, seeing in them the incarnation of the political, cultural communities and, in short, the homeland[8]. Eric Hobsbawm and Terence Ranger set out in the aforementioned work, how the invention of traditions, beliefs, rites, symbols and practices presented as centuries-old, have been recreated in recent times. They appear already settled, with a cultural background. This "invention of tradition" has several purposes: a social function, establishing social cohesion by developing a sense of belonging to a group; second, to give legitimacy to social hierarchies and national institutions and, finally, to inculcate and naturalize beliefs and systems of values and behaviour[9].

National identity is divided and perceived by different subjects, from different regions, from different socio-cultural groups and from multiple spaces and contexts. However, that plurality of subjects is grouped around the national symbols because human groups tend to feel more comforted and safe when we act in a common frame of reference.

There is a long list of national symbols and emblems such as places, monuments, festivals, personalities, heads of state, martyrs of the father/

[7] L. Arrieta Alberdi, *Un himno vasco sin consenso: Eusko Ereserkia* in C. Collado Seide (ed.), *Himnos y canciones. Imaginarios colectivos, símbolos e identidades fragmentadas en la España del siglo XX*, Granada, Comares Historia, 2016, pp. 263-280, p. 264.

[8] E. Hobsbawm & T. Ranger (eds.), *La invención de la tradición*, Barcelona, Crítica, 2012.

[9] A.E. Erdal Yıldırım, D. Ahmet Aslan, *Britain in the imperial age: history and national identity*, «History of Education & Children's Literature», vol. XII, n. 2, 2015, pp. 133-150.

motherland, etc., however, we usually give primacy to flags, coats of arms and national anthems, granting them a almost sacred character and they are worshipped as religious cult. The same thing that happens in the construction of nations applies as a disproportionate interest in legitimizing the symbols granting them the greatest possible antiquity[10].

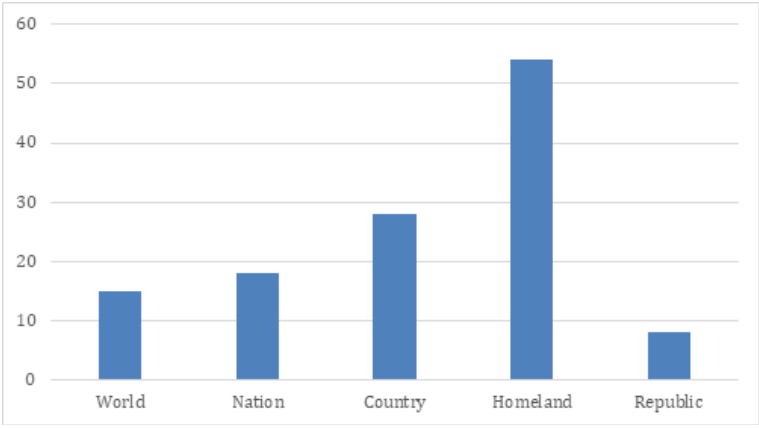
Symbols are links that unify peoples and that is why those that have been representative emblems throughout history are used and if not, a history is created for them, although it may be false. Otherwise, not being symbols of all citizens, they are transformed into something that generates confrontations, debates and disaffection.

National anthems and flags also concentrate the great ambivalence of modern states: the relationship between nation, or nations, and the State. The official symbols that are often enunciated in the constitutions are the visual and sonorous expression of the State[11].

Since their inception, national anthems have a clear nation-building goal: they represent a nation and also encourage and develop that feeling.

Analysing the lyrics of the national anthems of Europe, a repetition of terms related to nationalism is observed, and even when the term world is used (15 times in total), it is to highlight the role of a country in the world context. Discarding words that have five or fewer repetitions, the graph is as follows:

Graphic n. 1 Number of mentions of terms related to nationalism in European anthems



Source: Authors' own work after analysing the lyrics of 49 European National Anthems

[10] S. Berger, C. Conrad, *The Past as History. National Identity and Historical Consciousness in Modern Europe*, Basingstoke, Palgrave Macmillan, 2015.

[11] A.M. Thiesse, *Prologue*, in J. Moreno Lusón, X.M. Núñez Seixas, *Los colores de la patria. Símbolos nacionales en la España contemporánea*, Madrid, Tecnos, 2017, pp. 7-12, in particular p. 11.

The symbols are considered relevant because they are related to the origin, development and dissemination of nationalisms. They are incorporated into the language of national identities. As Manuel García Pelayo said, symbols are part of the processes of national integration and differentiation from other countries[12]. The anthem as a sign of identity separates and unites. It separates and distinguishes peoples, differentiates them and, simultaneously, identifies their people, generates a national conscience, brings about feelings of belonging to a Homeland.

The symbolic references fix the national imagery so that they become permanent, immutable and unquestionable to the point that they become part of the national patriotism that Habermas talks about[13]. Both people at the individual level and the community of citizens feel represented by these symbols. For this reason, disrespect shown to national symbols is penalized in most modern states[14], even though it conflicts with other constitutional norms such as freedom of expression, because it outrages not only the nation, but the group that has assumed it as its own.

In 2016 some players of the National Football League (NFL) began a protest movement that consisted of putting one knee to the ground or sitting down when the United States anthem was played before the start of matches. In this symbolic way, they denounced

> the multiple cases of police violence against the African-American community. Not only have they put a knee on the ground, but some teams have avoided going to the field when the US anthem is played, they have remained seated or they have also interlaced the arms in an example of unity[15].

In this case, the protest against the national anthem serves as a denunciation of situations that some consider unfair; however, others consider that as national symbols they should not be used for these purposes because they belong to the whole community.

Another case that generated great controversy among the Australian population was that of the nine-year-old girl Harper Nielsen who did not stand up when the anthem was sung at school as she considered it racist because it ignored the indigenous Australian population. As in the previous cases, this was her way of protesting against what she thought of as institutional racism[16].

12 García-Pelayo, *Mitos y símbolos políticos*, cit., pp. 907-1031.

13 J. Habermas, *Identidades nacionales y postnacionales*, Madrid, Tecnos, 1989.

14 This idea is in accordance with the rules that regulate the use of symbols of different States in which they reveal their meanings and establish when, how, where etc. they have to be placed or interpreted.

15 BBC World broadcast 26 September 2017 What is the «etiquette» when the USA anthem and that of other Latin American countries is played Latina. See <https://www.bbc.com/mundo/deportes-37215925> (last access: 13.01.2019).

16 News item, Australian girl arrested for saying the national anthem is racist, Excelsior

We also refer to a relatively recent example. In mid-October 2018 it was reported in the press that «An 'influencer' had been arrested and forced to apologize in public for humming in fun at national march in front of thousands of followers»[17]. National anthems, in addition to causing union and patriotism, can sometimes lead to the opposite in citizens of other countries or citizens who do not feel identified with these symbols. The news referred to the fact that Yang Kaili, a 21-year-old girl, on 7 October 2018, «committed the crime of humming the national anthem as a joke, as if she were an orchestra conductor, while hundreds of thousands of her almost 50 million followers saw her singing 'on line' on the platform Huya»[18]. Although she was quick to apologize, the Chinese authorities locked her for 5 days in a police cell and the platforms that supported her have withdrawn their considerable financial support. Some countries are more rigorous than others when it comes to enforcing respect for their symbols. But even so, it usually happens in the British ex-colony of Hong Kong that people react loudly in protest when the *March of the Volunteers* is sung, the anthem of the People's Republic of China. For its part, the platform.

Huya, which has been listed on the New York Stock Exchange since May, blocked Yang immediately after the incident, deleted all her videos and issued a statement of condemnation. «The national anthem is solemn and sacred. Huya respects the anthem and firmly protects its dignity», the company said, adding that Yang's behaviour reflects her lack of awareness of «law and social responsibility».

The irreverence, the transgression of courteous conduct and the lack of respect for national symbols are considered rude behavior, because they do not follow an unwritten rule, but which is accepted within social canons, namely, to respect peoples, their cultures and those things that represent them[19].

13/09/2018, <https://www.excelsior.com.mx/global/arrestan-a-nina-australiana-por-decir-que-su-himno-es-racista/1264908> (last access: 24.01.2019).

[17] Z. Aldama, *Sin tonterías con el himno chino* [*No nonsense with the Chinese National Anthem*], Ideal de Granada, 18/10/2018, p. 88. This information also appeared in other media as for example: <https://www.laprensa.hn/mundo/1225262-410/-carcel-youtuber-china-faltar-respeto-himno-huya-yang-kaili>; <https://www.elobservador.com.uy/nota/yang-kaili-la-estrella-china-de-las-redes-sociales-detenida-por-insultar-el-himno-nacional-de-su-pais-20181015133743>; <http://www.abc.com.py/espectaculos/gente/youtuber-china-a-la-carcel-por-faltar-respeto-al-himno-nacional-1750303.html> (last access: 19.10.2018).

[18] *Ibid*., p. 88.

[19] <http://www.abc.com.py/espectaculos/gente/youtuber-china-a-la-carcel-por-faltar-respeto-al-himno-nacional-1750303.html> (last access: 19.10.2018).

1.3 *Representation, interpretation and staging*

These symbols represent the social and political values of the «imagined communities» that are called nations, according to Benedict Anderson[20]. Therefore, they have a permanent character and their possible changes are the reason for strong social clashes. But the debates exist, because the content of the national anthems is related to the context in which they were written and, in some cases, they collide with the current circumstances.

National anthems are not only performed at solemn moments, festivals or official receptions or military parades, but at any other time when a person or group of citizens acts on behalf of their country. This is the case, for example, in international competitions, before confrontations in collective sports and in the delivery of trophies to champions. The victors are honoured by reminding them of their national connection through their symbols, usually the national anthem and flag. It is a custom that some may consider aggressive because it encourages competitiveness and exclusion among participants. It is the ostentation of a banal nationalism in the words of Michel Billig[21].

The interpretation and staging of national anthems takes place in public areas, transforming the ritual elements into collective symbols. They constitute one of the representative axes of the official cultural memory. The reasons for playing it are manifold, in ceremonies and official commemorations, on national holidays, in civil and political events, in cultural and sporting events. National anthems are played and sung at historical festivals, tributes, award ceremonies and international competitions, because what is international encourages national identities to differentiate, particularly in any act where heads of state, presidents and prime ministers are present, and at official inaugurations, etc.

The intonation of national anthems is carried out with due solemnity, following a liturgical protocol. Generally, they are sung or heard in the midst of religious silence. People stand with heads uncovered, some do it with their hands on their chests, rigid, fixed on the horizon, on the sky or fixed on the flag. There are those who close their eyes to feel emotions more intensely. Others with an arm raised, sometimes with a closed fist, sometimes adding cheers for the homeland.

Those who sing a particular hymn mark a symbolic border between *us* and *them*. The official chants offer a ritualized dramaturgy that makes the members of a community interpret it, in the same language and with a supposedly similar emotion, a common prayer[22].

[20] B. Anderson, *Comunidades imaginadas: reflexiones sobre el origen y la difusión del nacionalismo*, México, D.F., Fondo de Cultura Económica, 2007.

[21] M, Billig, *Nacionalismo banal*, Madrid, Capitán Swing, 2014.

[22] V. Flor, *La dominación simbólica en el País Valenciano: un himno para una región de España*, in C. Collado Sidel (ed.), *Himnos y canciones. Imaginarios colectivos, símbolos e identidades fragmentadas en la España del siglo XX*, Granada, Comares Historia, 2016, pp. 157-172, p. 163.

In the words of Benedict Anderson[23], they express the image of unison, of singing from the same hymn sheet Intoning the anthem, as when one participates in a party; it does not matter if the group is affiliated or sympathetic; whether it is left or right; if one is older or younger; it matters little whether one is a believer or not; There are no distinctions of social groups, or whether you are rich or poor, the important thing is to be integrated by means of a national symbol.

With national anthems, the idea of *us* is reinforced by diluting the self and people act as actors and agents. They are the voice and the expression of a collective that acts as an actor, exercising a role that gives it a status. People are also agents, because it is the collective that makes the decision to adhere to or exclude themselves in the interpretation of national anthems. Its interpretation is an act of personal and social physical interaction that motivates while integrating.

For these reasons, we are against the heritage status accorded to national symbols. We believe that material and immaterial symbols are part of the heritage of nations because they are associated with their history and their identity, their past, the present and are a socio-cultural heritage for the future. However, sometimes, there is an appropriation of the people or of some groups of heritage by partisan interests[24]. In this sense, we speak of a heritage of national symbols, which is a serious error because it presupposes the particular appropriation of something public, of a cultural asset that belongs to the community.

1.4 *Language and vocabulary*

One must take into account, on the one hand, the congruence between the political and ideological parameters of the context of the creation of national anthems and, on the other hand, the use made years and even centuries later. Logically, it is difficult to match the contents of the lyrics and the context in which they were written, with current social and political demands.

Some national anthems (for example, those of Georgia, Kazakhstan, Montenegro, Russia and Serbia) were created expressly to be part of the national symbols of a country; others (such as those from the United Kingdom, France, Italy or Portugal), designed for other purposes, were chosen at a given time for various political reasons. Over the years and already assumed as cultural representations of a people, their origin is no longer as relevant

[23] B. Anderson, *Comunidades imaginadas: reflexiones sobre el origen y la difusión del nacionalismo*, México, D.F., Fondo de Cultura Económica, 2007, p. 169.

[24] M. Chaves, M. Montenegro, M. Zambrano, «Revista Colombiana de Antropología», vol. 46, n. 1, 2010, pp. 7-27.

as their functionality. Likewise, the lyrics of national anthems (such as those of Belgium, Denmark, Finland, Greece, Hungary, Norway or Sweden) remain unchanged despite the changing circumstances of the societies they represent and the objectives for which they were composed; others, the least (Cambodia or the Democratic Republic of the Congo), have been modified.

It seems evident that all national anthems are equally representative of a community. In this sense, according to Billig[25], the meaning of the lyrics matters little. The remarkable thing is their meaning as national symbols that is what they have, as Lyn Spillmann says[26], referring to national flags, an immobility derived from their permanent adaptation. This chameleonic accommodation of national anthems to the different social and political contexts is due to their meaning, their capacity for accommodation and transformation, remaining inalterable for what is truly relevant to citizens: their symbolic value, that is, the significance of the anthem as a national symbol. From this point of view, what is incidental would be its literal meaning.

However, the analysis of the lyrics of the national anthems fosters a participatory and critical political culture. Their understanding and interpretation are very relevant because the lyrics emphasize tradition (in the Armenian anthem they sing: «Land of our fathers, free, independent, that has suffered from century to century. Your sons and daughters now proclaim Armenia sovereign and free»); the values, the laws, the desires for peace and for the conquest of civil rights (the German anthem says: «Unity, justice and freedom for the German homeland, that we all demand»), some invoke almighty God as the safeguard of the nation; (in the Serbian hymn they sing: «Oh God, save us! God feed the Serbian countries, the Serbian people!»); others express a rebellion against an oppressive system (Slovakia sings: «Slovakia arise, your chains are broken, beloved family, the hour has sounded, long live our glorious mother!»); there are those who denounce a detestable past (Italy sings: «We have been oppressed and ridiculed for centuries, we are not a single people, because we are divided»); and there are also those that incite solidarity and brotherhood (the Ukrainian anthem states «Our soul and our body we will sacrifice for our freedom, and we will show that we, brothers, are of the Cossack nation»); and even martyrdom for the nation (in the lyrics of the Turkish hymn it is said: «Who would not give his life for this beautiful land? […] May God take from me, my life, my loved ones and all my possessions, if He wants, but let Him not deprive me of my only and true homeland in the world»).

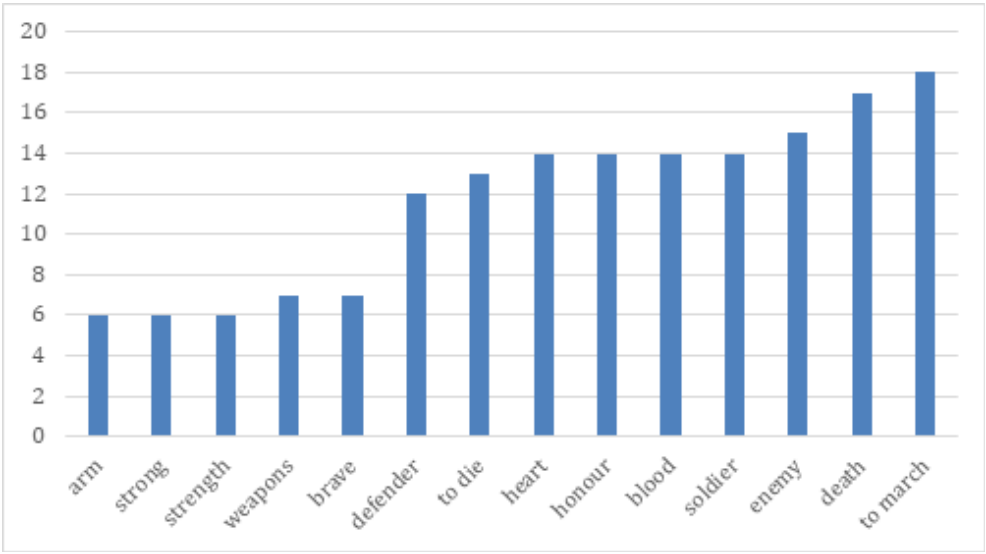
National anthems reflect, at the same time as they foment, hatred against the impious, the tyrants, the dominators or invaders; in this sense, national anthems are a canticle against absolutism, tyranny, and slavery.

[25] M. Billig, *Nacionalismo banal*, Madrid, Capitán Swing, 2014.

[26] L. Spillmannn, *Nation and Commemoration. Creating National Identities in the United States and Australia*, Cambridge, Cambridge University Press, 2007.

In short, they manifest some identities within a belligerent discourse that demands a clear break with the past. They express a secular resistance against oppressive regimes and the struggle for citizens' rights.

Graphic n. 2 Number of mentions of terms related to war, death, force, etc.



Source: Authors' own work after analysing the lyrics of 49 European National Anthems

This section related to war, the use of force, military virtues and even death that transforms soldiers into martyrs, is remarkable, both for the number of terms (88) related to warlike activity, as well as for the number of words whose repetitions are greater than five (14), and for the total number of repetitions (163). In this sense, we can assert that the distinctive aspect of nationalism in national anthems is belligerence.

Rebellion implies an act of desecration of the ideological foundations of the dominant system. Violence, on the other hand, is seen as an instrument to restore justice. Sometimes, death is mentioned as a generator of life, as the access to a rebirth and as a contrast to a decadent, destructive context, as being the door to civil and political regeneration. The humiliated, the mistreated will be blessed in the future. These anthems forecast a totally radical and opposite change of positions.

In this sense, some national anthems show a turning point ending a period in which tyranny dominated. The past is rejected and they predict a more promising future, a renewed time in which justice and equality will be implemented. They are a song of hope, they allude to a substantial change promoted by citizens' participation in the construction of a much better context.

On the other hand, the national anthems without lyrics (Spain and the Republic of Kosovo) manifest the impossibility of reaching a political consensus, the lack of union when it comes to clearly establishing common values or principles. Most national anthems have lyrics that fuse with music. In this way, music, as well as being an artistic expression, makes sense as an integrating resource and an emotional stimulus.

The lyrics of the national anthems form for citizens who sing them, two opposing antagonistic worlds: the tyranny and chaos reflected by the invaders and by the forces that must be overthrown and, on the other hand, the patriotism defended by those who support justice, order, political liberties and citizens' rights[27].

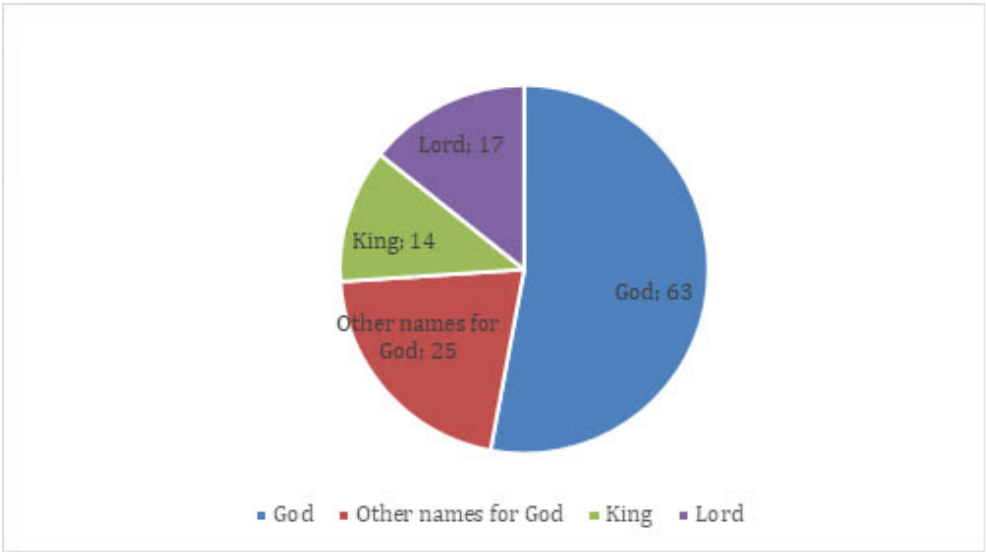
National anthems sometimes contain the oxymoron literary figure, contrary to pleonasm, which consists in using two concepts of opposite meaning in a single expression. In this sense, national anthems are war songs whose purpose is to achieve peace. Sometimes they give a bucolic image of the country, a sublimation of the homeland, and others are used as a tool, as a protest song, as an expression against the established power or against a potential external enemy. National anthems assume in their lyrics and represent different dualities: war and love; rebellion and union; joy and allusion to blood; fighting against the enemies of the Homeland and security in victory; they contain the idea that the nation is something alive so one must sacrifice oneself, if necessary; it gives life and one dies for it.

1.5 *Religiosity and sacredness*

National symbols have some analogy with religions because both are founded on beliefs and contain elements that are more emotional than rational. It is taken for granted that what they transmit is true and they seek to confirm this with the weight of traditions and with what their own sources contribute. Heroes, deeds, conquests and leaders are made into myths and in so doing the nation is exalted into a myth. Symbols settle and develop promoted by emblematic State forces such as political, social and religious leaders, apparently at the service of national interests. Some anthems refer to religion and its symbols as structural elements of its political organization; religion forms part of the basic ideology of some anthems, such as for example, the United Kingdom, the Netherlands and Iceland.

[27] G. Adámez Castro, *Aprender a escribir para aprender a militar. Análisis de 18 dictados producidos por las Juventudes Socialistas Unificadas*, «History of Education & Children's Literature», vol. XI, n. 1, 2016, pp. 37-59.

Graphic n. 3 Number of mentions of terms related to God



Source: Authors' own work after analysing the lyrics of 49 European National Anthems

As stated earlier, religion is often used as one of the constituent cultural elements of a nation. For this reason, it is not strange that His presence is noted also in His symbols. In a global context, 18 national anthems mention the word God in their titles[28], and the «majority of the countries mention God or include religious elements in their letters, flags or coats of arms»[29]. This same source, mentioning Wikipedia in its English version and in its report *Religious Symbols on National Flags*, affirms that there is a religious presence in 128 National anthems, in a third of the flags (in 64 of the 196 countries) and in a large number of the coats of arms[30].

According to an INFOBAE report, there are numerous national anthems in which God is mentioned[31]. Countries of all political regimes, with different major religions and some declared openly secular, make reference to God. The

[28] Blog de Banderas 23/09/2012 <https://blogdebanderas.com/2012/09/23/algunas-estadisticas-de-los-himnos-nacionales-del-mundo/> (last access: 18.01.2019).

[29] Laicismo.org 01/12/2018 <https://laicismo.org/la-mayoria-de-los-paises-mencionan-a-dios-o-incluyen-elementos-religiosos-en-sus-himnos-nacionales-banderas-o-escudos-de-armas/> (last access: 8.01.2019).

[30] See also J. Septión, *Una de cada tres banderas de países contiene símbolos religiosos: 44% cristianos; 33% musulmanes*, «Religión en Libertad», 29.11.2014, <https://www.religionenlibertad.com/cultura/39011/una-de-cada-tres-banderas-de-paises-contiene-simbolos-religiosos-44.html> (last access: 20.01.2019).

[31] INFOBAE: *Mapa del día: los himnos nacionales en donde se menciona a Dios*, 29 November 2014, <https://www.infobae.com/2014/11/30/1612086-mapa-del-dia-los-himnos-nacionales-donde-se-menciona-dios/> (last access: 24.01.2019).

study quoted refers, in turn, to a report published by the journal «Religion in Freedom» where the fragments of the national anthems with religious references (that we did not include for reasons of space) are also transcribed. In general, these allusions implore God's help to protect the homeland, ask Him to be on their side, to join forces to defend the nation against enemies, give them strength to fight, show their trust in Him, owe Him greatness and even «God who gave us peace, freedom and honour, keep us a nation». With these affirmations, the majority identification between nation and God is clear. There are those who claim that:

Countries that had a strong identity before and did not go through a hard war to become independent usually sing to God or mention Him. Also modern countries that have recently emerged from tyrannical systems (Russia from communism, apartheid South Africa) have new national anthems that invoke God[32].

The presence of religious elements in national symbols has led to controversies in some countries debating the separation of religion and the State. However, citizens do not usually address this issue assuming that the debate on symbols transcends the debate about religious beliefs. Some deduce from this fact

> that religious symbols express a certain spiritual fatherhood of the nation… it is like saying, in this territory we are of this spirituality and outside this territory we do not know. Anyway, over time, the bases on which it was chosen to put a religious symbol (sic) on the flag are diluted and the symbol usually begins to be seen as something only aesthetic that no longer represents what it meant at the beginning, the connotation of a country's flag swallowed the symbols that were inside and are seen only as a form devoid of the previous meaning[33].

It is considered that both flags and national anthems and coats of arms, analysed from a symbolic point of view, completely absorb the meaning of each of the elements that comprise it (images, letters, signs) and maintains its purpose of national representation. As a result, symbols are not usually modified even if they contain religious elements and there is even the express proclamation of a secular State.

[32] ForumLibertas/ReL, *Conozca los himnos nacionales, algunos muy modernos, que mencionan a Dios*, «Religión en Libertad», 09.08.2019, <https://www.religionenlibertad.com/mundo/23845/conozca-los-himnos-nacionales-algunos-muy-modernos-que-mencionan-a-dios.html> consultada el 24/01/2019. To learn which national anthems incorporate religious elements see <https://en.wikipedia.org/wiki/Religion_in_national_symbols#National_anthems_which_incorporate_religin> (last access: 25.01.2019). In it can be observed the countries, the name of the national anthem and the religions mentioned, as well as the flags and coats of arms and the religious characteristics.

[33] Editorial, *Los símbolos religiosos en las banderas de los países ¿Cuánto nos dice de la religiosidad en el país? Signos de estos tiempos 02/12/2014*, <https://forosdelavirgen.org/85917/los-simbolos-religiosos-en-las-banderas-de-los-paises-cuanto-nos-dice-de-la-religiosidad-en-el-pais-2014-12-02/> (last access: 27.01.2019).

Sometimes an indissoluble union is established between religion and civil and political power, very common among those who defend a national model in which religion is part of the public identity. Although some consider that religion is part of the private sphere, not all societies think of it in this way, questioning the laicization of public life and taking for granted the omnipresence of religion in civil life.

There is a double consideration of religion in nationalism. On the one hand, as an ethnic element, it constitutes one of the pillars on which national identity is based, serving as a socio-cultural cohesion. On the other, there is a certain mimicry between the bond established by religion between people and divinities with absolute loyalty to the nation, elevated to the status of supreme entity[34]. In this sense, Hayes agrees with Benedict Anderson[35] who considers that nationalisms are a cultural system and that like religion, they have their founding texts, a shared sacred language, sublimate death and speak of immortality.

National anthems have a sacralizing dimension because they establish a link with a higher entity as religious songs do. In this sense, the homeland is a totem, its sacred referent, to the point that if necessary, citizens have to give their lives for it. The sacrifice of some members of the community becomes unavoidable for the achievement of collective triumph. The prize is the transformation of individuals into heroes venerated by the community, into icons, into symbols of the group. Both music and lyrics are fused in the national anthems as if they were a reliquary that must be preserved and venerated.

2. *Functions*

National anthems were created as national symbols and have different functions[36] because they transmit ideas, create groups, supply information and cohesion, fix identity, encourage citizens' mobilization, etc. The present study focuses only on educational and political functions.

[34] C. Hayes, *Nationalism and Social Communication*, New York, Macmillan, 1960, cited in J. Álvarez Junco, *Dioses útiles. Naciones y nacionalismos*, Barcelona, Galaxia Gutenberg, 2016. p. 3.

[35] B. Anderson, *Imagined Communities*, London, Verso, 1983, Transl. to Spanish *Comunidades imaginadas*, México, FCE, 1993.

[36] H.J. Puhle, *Símbolos, mitos y lugares de memoria en la política contemporánea*, in M. Ludger (ed.), *La celebración de la nación. Símbolos, mitos y lugares de memoria*, Granada, Comares Historia, 1993, pp. 11-30. Hans-Jürgen Puhle points out five functions: self-affirmation of collective identities, promotion of cohesion and integration of the community, safeguarding the group, social and political mobilization and contribution to public education and to the process of general enlightenment of society (see in particular pp. 14-15).

2.1 *Education*

National anthems have played a very important role in the creation, development and consolidation of collective identities, reinforcing national values. National anthems represent a country; at the same time they are a national instrument but are, moreover, an instrument that consolidates the nation, that is, they have a socializing and political participation function. In this sense, they are part of the educational processes of the citizens transmitting national principles and values, being used with the same purpose by civil, religious, political or military agents. For this reason, it is considered relevant to analyse the values and ideas that national anthems transmit through their lyrics: because national anthems propagate an ideology and participate in the formation of a collective identity.

In some national anthems citizens are exhorted to behave like soldiers defending the homeland, face tyrannical rulers, break the chains of domination and assume the example of warlords and heroes. We will cite as an example from the anthem of Azerbaijan:

> Thousands of souls were sacrificed for you. Your heart became a battlefield. The soldiers who were deprived of their lives, each of them became a hero. You can become a blooming garden. We will sacrifice our lives for you at every moment.

In others, citizens are encouraged to practice a blind obedience to law and order and to place themselves against the impious and dictatorships. In the French anthem they sing: 'And what! Will we suffer that these foreign troops to dictate the law in our homes, and let these mercenary phalanges overcome our brave warriors?' Macedonians: 'Macedonians fight for your own rights!'

And in Sweden:

> I constantly want to serve my beloved homeland, I swear I trust in every way. Your rights I will defend with my mind and my hands, your prodigious insignia I will carry aloft.

These anthems, like the rest of the symbols, are used as channels to develop national feeling. In this way, we could speak of an «Italianisation of the Italians», of a «Spanishization of the Spaniards», of a «Frenchification of the French», and so on for the rest of the nations. With the symbols, nationalism is based on of a reconstruction of history, looking for roots that would feed the essences, the hypothetical being of each nation.

National anthems are catalysts of a nationalist emotional education and generators of moods. They tend to take root among the citizens, generating enthusiasm when they are heard or sung. They act as mobilizing stimuli of national feelings. National anthems are expected to generate emotions of national pride and empathy, but also to mobilize citizens in times of tension or euphoria. They may involve melancholy for a glorious past and expectations of a promising present that has come or will come in the future. Expressly or tacitly, national anthems communicate a message of love for the Homeland, of

solidarity, of courage or arouse feelings of pride. Barbara H. Rosenwein spoke about the «emotional communities» created by human collectives to ensure their group identity and that of each of their members, as well as the solidarity, discipline and cohesion of all individuals in a community[37]. The Estonian hymn is called *My country, my pride and my joy*; the one from Russia sings of *Glory to the fatherland! We are proud of you!*; in that of Serbia, it is said: God unite the Serbian brothers, in each glorious and proud task. The union will be the defeat of the devil and in that of Liechtenstein they sing. In short, national anthems are a catalyst for emotions that lead to the development of a national consciousness and for these reasons have an educational function.

2.2 *Politics*

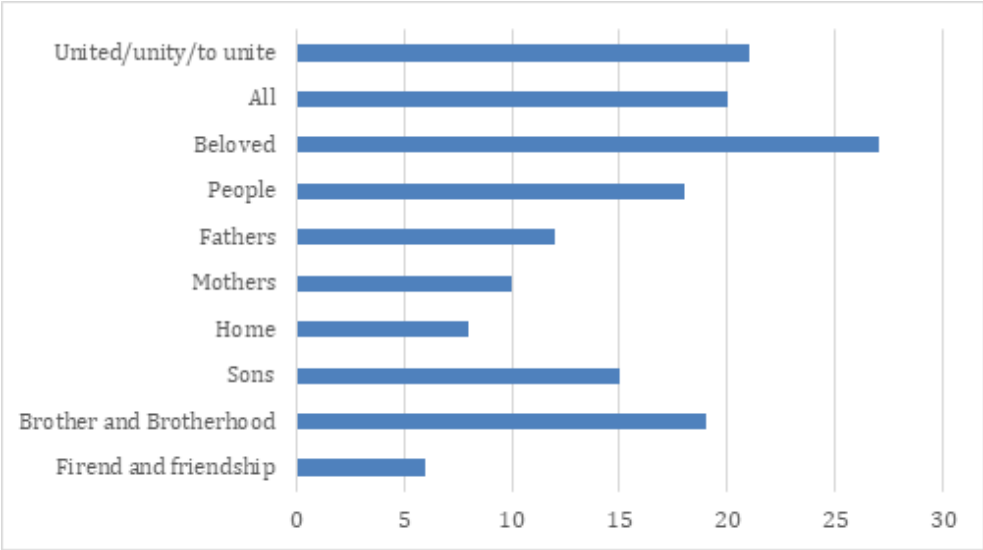
A series of political functions of the national symbols, and more specifically of the anthems can be stated concisely:

- They condense and simplify a common ideology, a national identity.
- They homogenize and unite sensibilities despite the cultural differences between people and groups.
- They fix the nation's identity with respect to external groups, they establish borders.
- Rituals and behaviours are created around symbols, both when they are honoured and when they are outraged.
- They represent the nations and the States.
- They are used as nation-building instruments in festivals, schools, commemorations, etc.
- They generate emotions that are reflected in individual and collective conduct.
- Mirror function: values to be achieved and imitated are reflected in them.
- National anthems encourage citizen mobilization.
- They present diverse facets: sometimes they can have a political meaning, of consolidation or of vindication, and other ethnic, full of memories and traditions.

National anthems frequently refer to the bonds of brotherhood that unite citizens. An example of mimesis between nation and family ties is observed in the use of terms found in national anthems that imply feelings of union and affection.

[37] Puhle, *Símbolos, mitos y lugares de memoria en la política contemporánea*, cit., pp. 11-30. Hans-Jürgen Puhle señala cinco funciones: autoafirmación de identidades colectivas, promoción de la cohesión e integración de la comunidad, la salvaguarda del grupo, la movilización social y política y la contribución a la educación pública y al proceso de la ilustración general de la sociedad, pp. 14-15. See also: B.H. Rosenwein, *Emotional communities*, Ithaca, Cornell University Press, 2006.

Graphic n. 4 Number of mentions of terms related to union and affection



Source: Authors' own work after analysing the lyrics of 49 European National Anthems

The most outstanding words for the high number of repetitions are, beloved, mostly united to mother country (60% of the times) and to earth (22% of the times) for example, Estonia repeats four times «My beloved country», Liechtenstein mentions the two terms «This beloved mother earth, this beloved fatherland»; unite, all, and people are terms that indicate national cohesion (Norway sings, «This country that Harald united with his army of heroes»; Poland «We will unite with the nation»; Azerbaijan sings, «All of us are ready to give our lives for you!» and Belarus, «The friendship of the peoples is the power of the people») and the rest of the terms in most of the anthems imply similar family roles, emphasizing the sense of brother and sisterhood and that of father and child (Germany, «United fraternally for protection and defence»; the anthem of Italy is called *Brothers of Italy*).

National anthems refer to a glorious past, to triumphs over enemies of the fatherland and to the unity of citizens. Simultaneously they echo denunciations against domination and the lack of liberties. Not only do they justify, but they glorify violence and war because they consider it just. Rebellion is presented as an act of freedom that involves legitimate violence, or in other words, violence is considered an instrument to implement or restore justice. In the Polish anthem citizens sing «What the violence of others has taken away from us, with the sword we will recover». The oppressive power is represented as repugnant, as despicable beings deserving of any punishment, of any exemplary execution. The Romanian anthem proclaims, «Romanians awake from the dream of death

into which the barbarous tyrants plunged you», and in the Marseillaise they sing, «Tremble, tyrants and also you perfidious ones, reproach of all parties! Tremble! Your parricide projects are going at last to receive their punishment».

National anthems demand, generally, not only change, but a break with the established *status quo*. They nourish, they give life and feed the community with illusions. They reaffirm the need for change and the hope that national values will be established. Seen from the outside, they are analysed as an expression of a subversive political culture. From within, they express the voice of an oppressed people that yearns for liberation.

They give an image of the vulnerability of evil, of the invader, of the dictator and predict a definitive triumph of the good. That is why they evoke an idyllic, poetic and unreal reality of the future. Those who interpret national anthems are considered actors who denounce an established order, but are seen as harmful to the community for being unfair and oppressive. The army is considered as the champion of the nation's unity by the existing sides. Political power, if not the army itself, is considered as the most potent force of national cohesion, of liberation and of conquest of glory.

Although we observe a large number of words (62 in total) related to the victory that inevitably follows the war for national independence, 27 terms are related to military victory, highlighting prince (6 times) and power (10 times), and 35 words linked to the principles of a democratic nationalism such as law, freedom, equality and solidarity; yet none of them reaches the figure of five repetitions.

Within a logical process, after the victory comes national splendor. A total of 26 terms are related to the final outcome, that is, to the state of happiness that overwhelms the citizens, the words most repeated in the National anthems of Europe being: star (5 times), glorious (6 times), joy (7 times), joy, (12 times), heaven (14 times), glory (18 times), shine (20 times), which makes a total of 82 repetitions of the most significant words related to the happiness that follows the final victory.

It seems incongruous that some their contents, like the incitement to hatred that some National anthems preach, the desire for revenge, the encouragement to develop rancor in each of its interpreters, etc., are considered as related to the principles of the Universal Declaration of Human Rights. However, the effects produced by the allusion to violence are also connected with to joy, celebration and hope. They are the obverse and the reverse side of the same coin. National anthems are full of contradictions. On the one hand, they help to establish a collective memory that aspires to create a better future in which peace will reign. On the other, they are based on a past full of drama, of horrors engendered by violence. They are the expression of a triumphal hope, of a festive and playful context in which a triumph is celebrated. For this reason the country pays homage to the heroes and the fallen.

Conclusions

Reflecting on national anthems is to think about the history of each nation and whose purpose is to reconstruct, reinterpret and understand the past. For this reason, some symbols have been analysed that although their contents may seem anachronistic, they are part of the history of nations and the lives of citizens. But from what perspective do we build the historical narrative? We have tried to make it clear in our study that national anthems, by their origin and by their functions, have to be analysed as being nationalist symbols.

National anthems transmit an artificial national reality created and maintained by the dominant cultural groups, that is, through them and their decisions when choosing the symbols (among many other cultural proposals), we perceive the idea of each nation. Consequently, we cannot lose sight of the fact that national anthems are symbols of nationalist identities and, as such, have meaning within this vision of history.

Even more than the lyrics and even the music, national anthems acquire a symbolic value because of the context in which they are sung, by the personal circumstances that each one feels, by the collective emotions that they provoke and, in short, by the unison that a political communion represents[38].

National anthems, like the other national symbols, are cultural creations that respond to certain social contexts and are part of the symbolic capital of the people. Generally, the dominant culture devours other secondary cultures, and their symbols also become dominant and representative of all.

National anthems usually attack the past when it is related to the lack of liberties and political submission to a tyrannical power, proposing a sociopolitical and cultural otherness; however, when referring to the historical roots of the nation, they outline a sacred past, full of heroes and deeds that provoke feelings of national pride. In this sense, national anthems are national heritage and, as such, reflect a singularity and, sometimes, a fictitious national superiority.

National anthems reproduce and in turn generate national identity and patriotic pride because they allude to legendary feats, to collective claims, to what are considered the founding myths of a nation and the exemplary conduct of the heroes that embody the values that must be the backbone of a nationalist community. For these reasons, national anthems create a common identity, generate an equally communal and personal self-esteem and educate citizens in a nationalist political proposal. They are not reliable historical sources because their construction is not based on truthful objective facts and principles; but without them, as without the rest of the symbols, history would approach the subject of identities partially.

[38] B. Anderson, *Comunidades imaginadas: reflexiones sobre el origen y la difusión del nacionalismo*, México, D.F., Fondo de Cultura Económica, 2007, p. 148.

National anthems are identified with the past, with a revolutionary background, with the power to call for a demand for freedom despite the fact that today the existence of a democratic State is a reality.

There is feedback between the subjects and the symbols: national anthems unify and create uniform communities and the individuals, singing national anthems or participating in their intonation, self-sustain that symbol of nationalist identity. National anthems convey a shared consciousness of patriotic dignity and pride in a repetitive and recurrent way. Generalizing, it can be affirmed that they satisfy the subjects and their messages are internalized unconsciously. Few citizens adopt a critical attitude towards symbols. Rather than education, one should talk about the political indoctrination of national anthems.

National anthems reproduce a series of clichés without a rational basis that foster patriotic pride, fraternity and civic union, religious tradition, the persistence of an external enemy and the exclusion of those who are not part of the collective, a conceit based on honour and some national virtues. National anthems not only promote a warlike spirit as a means to the conquest of happiness, the sublimation of the territory but are also a fundamental part as an essentialist identity or the exaltation of death for the homeland alongside the nation's heroes.

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The selection of *elites* during the italian fascist period: from Gentile's idealism to Bottai's eugenics

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ABSTRACT: This paper sets out to analyse the nature and role of the Italian school system during the fascist *Ventennio*, i.e., the twenty years of fascist rule. In particular, the analysis follows the thread of elite selection in order to examine the characteristics of the Italian youth from 1922 to 1943 by studying primary sources and the literature in this field. Similarly, by highlighting the origins of the close dependence of pedagogy from the dominant ideology in the years of radical reorganization of the school system (the so-called «bonifica fascista»), the paper delineates the move from idealistic selection, nationalism, and Giovanni Gentile's idea of education of the Spirit to a school system that was meant to select the right people for the regime, based on Giuseppe Bottai's works and influenced by Italian scientists' eugenics theories.

EET/TEE KEYWORDS: History of education; Idealism; Fascism; Gentile; Bottai; Italy; XXth Century.

1. *Educating and selecting the fascist youth*

The school of the fascist *Ventennio* was presented and intentionally identified as the place where the future ruling classes were educated and selected: it was necessary to select the school population in view of the role that each individual would play in the project for the growth of the nation. When Giovanni Gentile was the Minister of Education, the principles of «nazionalità del sapere e della scuola» («national knowledge and national school»)[1] were advocated, and for

[1] G. Gentile, *La Riforma dell'educazione. Discorsi ai maestri di Trieste*, Bari, Gius. Laterza &

each pupil was chosen a given education pathway based on their social class and, even more importantly, based on their specific spiritual characteristics. Following Gentile's term, Mussolini's obsession with educating a healthy youth able to «build empires» became more radical, and resulted in more rigid measures to indoctrinate all Italian people aged between 8 and 18 to the values of nation and fascism.

Mussolini's Italians had to be shaped both in schools and in fascist youth organizations through the education of their personalities and the eradication of those weak personality traits that were regarded as typically Italian, i.e., «il semplicismo, la faciloneria, il credere che tutto andrà bene» [«the simplism, carelessness, and the belief that everything will be fine»], «inherited defects» – as the Duce defined them – of the average Italian citizen[2]. The fascist regime wanted, therefore, to promote a new mind-set based on strictness and initiative as opposed to middle-class disvalues. The fascist school system wanted to provide real experiences rather than mindless erudition, which had an end in itself. In contrast to the biologic and genetic determinism fostered by the Germans and the weakening science of materialistic control and rationalization endorsed by the Anglo-Americans, the fascist regime wanted to promote the new man's belief in the power to create through its expansionistic and procreating power, its faith in a blooming future, its support to "qualitative" eugenics – i.e., aimed to regenerate society and make people both physically and mentally healthier rather than to eliminate the rejected ones, which occurred instead in Nazi Germany[3].

During the years between 1922 and 1943 two Ministers of National Education played a pivotal role in the implementation of the above-mentioned plans in Italian schools: Giovanni Gentile, who served as the Minister of Education from 1922 to 1924, and Giuseppe Bottai, who was minister from 1936 to 1943. They authored two main administrative texts – the *Riforma* (Reform) issued in 1923 and consisting of a large number of decrees, and the *Carta della scuola* (Charter of School) issued in 1939 – which are fundamental

Figli, 1920, pp. 1-21 (*Discorso inaugurale tenuto il 6 agosto 1919 nella grande sala della Società Filodrammatica*).

[2] See E. Susmel, D. Susmel (edd.), *Opera Omnia di Benito Mussolini*, Firenze, La Fenice, 1951, Vol. XXII, pp. 23 ff.

[3] See C. Mantovani, *Rigenerare la società. L'eugenica in Italia dalle origini ottocentesche agli anni trenta*, Soveria Mannelli, Rubettino, 2004, pp. 279-280: «Nel caso italiano [al contrario del caso del nazismo] i programmi di eugenica negativa vengono a tacere per presunta immoralità demografica mentre i programmi di eugenica "fascista" vengono a coincidere con le misure direttamente o indirettamente collegate al rafforzamento quantitativo della popolazione. In questa evoluzione un ruolo determinante è giocato dall'ostilità della Chiesa cattolica nei confronti dei programmi dell'eugenica anglosassone» («In the case of Italy [differently from the case of Nazism] negative eugenics programs were not implemented since they were regarded as immoral, whereas "fascist" eugenics programs coincided with measures directly or indirectly related to the qualitative strengthening of the population. In this context, a crucial role was played by the Catholic Church's hostility against Anglo-American genetics programs»).

to understand, beyond any prejudice, the educational spirit that dominated the years of Mussolini's rule in Italy. Under Gentile, the selection of talented pupils – the "few but good ones" – was entrusted to *liceo classico* [a type of secondary school focusing on humanities], and the talented ones stood out by virtue of their ability to follow a pathway of spiritual education, namely by virtue of the adolescents' ability to resist in climbing the arduous ladder of annual exams that allowed them to move to the next class of the *liceo classico*. This type of school was reserved to *aristoi*, to those few and best pupils who were able to continue to study, driven by their personal pursuit of culture and knowledge rather than by the qualification they could achieve.

The analysis of Gentile's works, the interpretation of the rather inhomogeneous development of his ideas on education, the study of his nationalistic ideals and his conception of knowledge, the inquiry into the meaning of the spiritual transformation entrusted to school and expressed before and after 1925 in his political role as well as in his role of influential intellectual in the fascist regime, clearly reveal that the real aim of the philosopher from Castelvetrano was to discourage the masses from attending school, as he believed that providing schooling to the masses was the most evident problem and risk for the *liceo classico* and for the Italian school as a whole[4].

[4] This belief was based on Gentile's conceptions of education, schooling, and pedagogy itself, which lost their technical aspects and were, instead, assigned historically active, political and ethical tasks, so that the school reform soon turned into a reform of the spirit. Hegelian and nationalistic ideals, which were going to play a pivotal role in Fascism, deeply influenced the 1923 reform, whereby the whole school system was designed to pursuit the moral reform of the nation, which required «la scuola ha da essere innanzitutto suscitatrice di fede e plasmatrice di coscienze» («the school, first of all, to rouse faith and shape minds») (G. Gentile, *Il fascismo al governo della scuola*, Palermo, Sandron, 1924, p. 33). To do so, teaching principles and practices were transformed. This renewal also revived the conception of knowledge, «non quale è nei libri muti, ma quale vive appunto nella scuola, nella quotidiana ricerca della nostra anima, intenta nella indagine morale, nel vagheggiamento della sua letteratura e della sua arte, nella meditazione della sua storia e nello studio della sua stessa terra, teatro e campo della sua millenaria vita laboriosa e non sempre avventurata, ma gloriosa, ma luminosa nella sua stessa sventura, a conoscere e quindi a formare a educare se stessa, a costruire e a cementare la coscienza della nuova Italia» («not as it is presented in cold books, but the knowledge that is alive in schools, which is involved in our everyday search for our spirit, in moral investigation, in appreciating national literature and art, in meditating on the history and the study of its own land, theatre and field of the nation's thousand-year old laborious life, not always lucky but glorious life, bright despite its misadventures, to learn about itself and to educate itself, to shape and cement the conscience of the new Italy») (Gentile, *La Riforma dell'educazione*, cit., p. 4). The quality of elementary teachers training was granted by the strongly nationalistic culture based on humanities and philosophy while for the "few but good ones" destined to be members of the ruling class, the humanities-based secondary school was designed – where they could practise their spiritual, critical and meditating skills. The dramatic transformation of the education system, also in its most work-related aspects, was brought about by criticism and a need: the criticism was against abstract teaching, so that «A poco a poco per quello che ha appreso e per quello che insegna (elementi, per lo più, che nella loro astrattezza, sfuggono infatti al flusso rinnovatore della vita spirituale), il maestro finisce col chiudersi in un certo numero di idee, che sono quelle che sono, e non si correggono, non si trasformano, non vivono e non hanno più il calore della vita,

In order to avoid the damages deriving from overcrowded classes, rigorous admission exams were introduced, which were devised to verify that the pupils' maturity level was suitable for them to move on to the next class. What was to be verified throughout the rigorous evaluation process was the pupils' level of spiritual maturity, which was tested through general knowledge exams. The board – consisting of the teachers who had prepared the pupils in class as well as of teachers from the school the pupils were going to enter – had, therefore, to test the pupils' level of spiritual education, rather than the amount of notions they had acquired. This idealistic and selective idea of schooling – which was criticized and changed, as we shall see – that dominated the early years of Fascism was followed by a different and certainly degenerate idea of selection through schooling and education in the central and final stages of the regime, when Bottai served as the Minister of National Education.

Gentile's 1923 designs were progressively and, eventually, radically changed, until the *Carta della Scuola* proposed by Bottai to the Grand Council of Fascism was approved in 1939. This change was due to several factors: first of all, the intense imperialistic propaganda; in addition, on one side, the need to establish a link between the new economic conditions of Italy – which was at war and needed a recovery – and, on the other, the necessity for an education system that could meet the real social needs of the country and the demands coming from the world of work; finally, the fascist will to make schools similar to *fascist squads* and paramilitary organizations. This document, which the

poiché si sono meccanizzate; e lo spirito che le accoglie e conserva, ha perduto quell'attitudine naturale al dubbio, che è insoddisfazione del saputo e del modo in cui si sa, e pungolo a sapere di più, a sapere meglio, a esaminare il proprio pensiero, se stesso, e i propri sentimenti, e il proprio carattere, e a restare aperto a tutte le suggestioni, e tutti gl'insegnamenti di cui rimane sempre ricca la vita» («Little by little, given what they have learnt and what they teach (elements which, for the most part, are so abstract that they remain untouched by the renovating flow of spiritual life), elementary school teachers end up narrowing their minds and restricting their ideas to few ones, which are what they are, and cannot be corrected, cannot be changed, have lost the warmth of life as they have become repetitive, and the spirits that host and keep such ideas have lost their natural attitude to have doubts, which derive from dissatisfaction with what has been learnt and how it is known, and spurs to learn more, to learn better, to examine their own thoughts, themselves, and their own feelings, as well as their own personality, and to remain open to all attractions and all the teachings of which life is always full») (*Ibid*., p. 8). It was necessary to shape the minds of the new Italians through schooling and education, in the wake of a type of nationalism imbued with historicist traits as well as traits of the Risorgimento, full of ethical and religious passion, very different from the nationalistic views of the early years of the 20th century. It was Mazzini's idea of nation that animated Gentile's pedagogical ideals; similarly, the historicist nature of the *Destra Storica* (the Historical Right) was central, with its dimension of the State and of the State Authority, which characterized the idea of spiritual, ethical and educational awakening underpinning the 1923 reform. See G. Gentile, *Il problema scolastico del dopoguerra*, Napoli, Ricciardi, 1919; *Dopo la vittoria*, Roma, La Voce, 1920; *I profeti del Risorgimento italiano*, Firenze, Vallecchi, 1923. For further reading, see, *inter alia*, A. Del Noce, *Giovanni Gentile. Per una interpretazione filosofica della storia contemporanea*, Bologna, il Mulino, 1990.

minister called "Carta" in accordance with the fascist lexicon[5], had been – not by chance – anticipated by the *Carta della Razza* (Charter of Race) issued in 1938, and before that, by the *Manifesto degli Scienziati Razzisti* (Manifesto of Race), signed, amongst the others, by Nicola Pende – who was a Senator and the Director of the Department of Medical Pathology of the University of Rome – and, even before, by the *Carta del Lavoro* (Charter of Labour) of 1927, which had been submitted to the Grand Council of Fascism by Giuseppe Bottai, then Undersecretary of the Ministry of Corporations.

Under Bottai, the idea of selection was a complex issue, which had to be examined bearing in mind the historical framework of the period and the ideological and political role assigned to education during the last years of Mussolini's regime. In general, in order to understand the new selective role assigned to the school system, it is useful to take into account the example of Latin and the way it was taught: under Gentile, Latin had been identified as a means for the growth of the spirit; under Bottai, it was used by the regime as a tool to instil the myth of Roman glory in all citizens. This, however, is a not an exhaustive example, though a symbolic and important one, to capture the true nature of the whole Italian education system.

Pan-Latinism, sanctioned through the teaching of Latin in the middle school, was a sign that would become increasingly evident, of the rhetoric and verbalism that flourished in the wake of Mussolini's new humanism while the prestige of classicism was declining. It is worth noting that, following the real fascist reform of the school system that was implemented at the end of 1936, the principles and aim of selection were totally different from those of 1923. The high ideals of Risorgimento that had inspired Gentile's conception of national school and culture had been abandoned. As a result of the fascistization of the school system, ideologization and regulation had progressively become dominant, together with the utopian idea of selecting almost artificially the men and women of Fascism. Selection in schools involved real discrimination: talent was no longer the main quality to be identified in pupils; the integrity of the Italian descent, instead, became the cultural, scientific, educational and administrative drive, which was to be defended in the regime's school and political systems.

In the regime's perspective, the selection of elites was functional to the educational objective to have the masses adhere to the values of the fascist State and became significant within the Duce's and his most loyal followers' design to make Italian people perfect so as to ensure the good physical and moral quality of future generations[6]. In other words, the ideology underlying the corporative state was built through the school system as a whole. And, in accomplishing this task, the school system was supported by the *Opera Nazionale Balilla per*

[5] See G. Bottai, *La nuova scuola media*, Firenze, Sansoni, 1941, pp. 382-383.
[6] See G.L. Mosse, *La nazionalizzazione delle masse*, Bologna, il Mulino, 1974.

l'assistenza e per l'educazione fisica e morale della gioventù (ONB for physical and moral youth assistance and education) as well as the *Fasci Giovanili di Combattimento* (Young Fascist Combat Groups) and the group of *Giovani Fasciste* (Fascist Young Women), later on by the *Gioventù Italiana del Littorio* (GIL, Italian Youth of the Lictor), and the *Gruppi Universitari Fascisti* (GUF, Fascist University Groups)[7]. In 1936, in his radio broadcast discourse to pupils at the beginning of the school year, Bottai made officially known the State's aim to implement race discrimination in schools through a renewal of the entire school system[8].

In Bottai's vision, the necessary renewal of society and of the entire Italian school system could hardly be implemented in the traditional and conservative classical educational pathways, i.e., in the *liceo classico*, which was still based

[7] The ONB, founded through Royal Decree of 3 April 1926 n. 2247 for the fascist party children and young people aged from 8 to 18, was led by Renato Ricci from February 1927 to 1937. For young men aged between 18 and 21, in October 1930 the Grand Council of Fascism established the *Fasci Giovanili di Combattimento*, led by Carlo Sforza. Since 1920 the *Gruppi Universitari Fascisti* (GUF) were established, which were reorganized by the Fascist Party in 1927. By Royal Decree of 27 October 1937 n. 1839, male and female children and young people aged between 6 and 21 were brought together in one organization called *Gioventù Italiana del Littorio* (GIL), which had the motto «Credere, Obbedire, Combattere» (Believe, Obey, Fight) and was directly controlled by the secretary of the Fascist Party, in line with the principles of Bottai's *Carta della Scuola*. See. G. Bottai, *La Carta della Scuola*, Milano, Mondadori, 1941[2], pp. 20-21. For further reading on fascist youth organizations, see V. Meletti, *Civiltà fascista. Per le scuole complementari e di avviamento al lavoro, per i maestri e per il popolo*, Venezia, La Nuova Italia, 1941[5] (I ed. 1929). For further reading on university groups, see M.C. Giuntella, *Autonomia e nazionalizzazione dell'università. Il fascismo e l'inquadramento degli Atenei*, Roma, Studium 1993 and, by the same author, the essay *I gruppi universitari fascisti nel primo decennio del regime*, «Il movimento di liberazione in Italia», n. 107, 1972, pp. 3-38. See also L. La Rovere, *Storia dei GUF. Organizzazione, politica e miti della gioventù universitaria fascista 1919-1943*, Torino, Bollati Boringhieri, 2003. For a general overview of the topic, see, amongst the most recent works based on a solid scientific structure, archive sources, and periodicals, E.K. McLean, *Mussolini's Children: Race and Elementary Education in Fascist Italy*, University of Lincoln & London, Nebraska Press, 2018. See also the recent volume by L. Pomante, *Giuseppe Bottai e il rinnovamento fascista dell'Università italiana (1936-1942)*, Milano, FrancoAngeli, 2018.

[8] See R. Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, Firenze, La Nuova Italia, 1979, p. 13: «[…] bisognava rivitalizzare le istituzioni, promuovere il loro rinnovamento dall'interno, migliorare la preparazione degli insegnanti, aumentare il loro slancio ed il loro impegno. Bottai si dimostrava, in altre parole, convinto che la crisi della scuola aveva radici così diffuse che sarebbe stato illusorio pensare di risolverla modificando, con una legge, un settore limitato, seppur nevralgico, dell'ordinamento vigente. Con ciò egli non intendeva rinunciare ad ogni velleità innovatrice, quanto piuttosto allargare il discorso portandolo, al di là delle strutture, sui programmi, sui metodi didattici, sul significato e le finalità dell'educazione nello stato fascista» («[…] it was necessary to revitalize institutions, promote their renewal from inside, improve teachers' competences, raise their motivation and commitment. In other words, Bottai seemed to be sure that the crisis of the school system had such deep roots that it would be misleading to believe that it could be overcome by modifying by law only one sector – though a strategic one – of the current system. However, he did not want to discard the idea of innovation; he wanted to innovate not only the structure and organization of the school system, but also the curricula, the teaching methods, the meaning and the objectives of education in the fascist state»).

on a long-established teaching method that was considered to be unchangeable. The rigorous logical analysis and the constant reading of classics were essential components in educating pupils destined to reach the highest social positions. Differently from Gentile, Bottai's view of the general issue of the school system did not involve any philosophical or intellectual aspect; unlike Gentile, the new minister mainly focused on the reorganization and regeneration of the real school of the people, namely the *scuola di avviamento professionale* (vocational and training junior high school), as well as on the attempt to eliminate the old prejudice on the superiority of humanistic culture over professional education and training[9]. The complete education of fascist people was the main objective of the school in the fascist period, which was to be achieved by solving the real problem, that is the significant difference between classical education and technical education, as well as the contrast between school and politics and between the education system and the world of work. Once the fascist ideology had been fully established, the main aim of Gentile's classical school, i.e., the education of the spirit, was abandoned, for the new objective was no longer unbiased culture that could boost people's inner qualities and foster critical thinking, which meant achieving inner freedom.

2. *Giovanni Gentile: education of the Spirit and nationalism*

During Giolitti's last term – which only lasted one year (June 1920-June 1921) – Benedetto Croce was the Minister of Public Education. It was a stage in the history of the Italian school marked by revisionist trends, which, however, did not lead to a real reform of the education system, above all the secondary school system[10].

In this historical period, the over-twenty-year-old idea of thoroughly reforming the Italian school system was formulated and programmed by virtue of the general consensus that the *Casati Law* of 1859 was obsolete, although it had contributed to make more modern and homogeneous the school systems of the States that came to be part of the new Italian nation. In this scenario, the general reorganization of the school system was programmed; it concerned both the methodological and the administrative fields[11]. As known, the Nation was

[9] For a general description of Giuseppe Bottai's plans on schooling and education, see M. Agosti, *La Carta della Scuola*, Brescia, La Scuola, 1940.

[10] See R. Fornaca, *Benedetto Croce e la politica scolastica in Italia nel 1920-'21*, Roma, Armando, 1968 and G. Tognon, *Benedetto Croce alla Minerva. La politica scolastica italiana tra Caporetto e la marcia su Roma*, Brescia, La Scuola, 1990.

[11] In the early decades of the 20th century, the Italian school system was still organized according to the *Magna Charta* of 1859 which, after sixty years after entering into force, was considered to be inadequate to meet the social demands and the political needs of a changed scenario (See D.

not formed because, according to many, there was no adequate political power or policies to achieve it. The suitable drive had been found by the Gentile-led Ministry which, having received the necessary powers by the first Mussolini government, began to issue a series of decrees that laid the foundations for the school reform[12].This reform, therefore – as Gentile himself reaffirmed in responding to criticism – originated from careful thinking over a period of more than twenty years before it was approved, and from ideas about the school system that had been developed in the political and cultural scenario of the early 20th century. On 12 October 1928, an article appeared in the «Corriere della Sera», where Gentile expressed his dissent from the policy of adjustments. However, it was above all in an article published in March 1929 that the philosopher provided a precise and clear account of the history, origins and reasons behind the 1923 reform: he underlined the fact that the reform had originated from ideas developed over decades, even before the March on Rome and before the war; he also explained that such ideas were to be regarded as «il risultato di larghi studi sugli ordinamenti scolastici italiani e stranieri e di una nuova scienza dell'educazione scaturita da una nuova filosofia [neoidealistica]» («the result of deep research on Italian and foreign education systems and of a new science of education derived from a new [neo-Hegelian] philosophy»)[13].

It is clear that, when the National Fascist Party was established on the initiative of Benito Mussolini by the end of 1921, the issue of the Italian school and education system was already being debated by intellectuals, people working in schools, politicians, Catholics and lay people. Periodicals played a crucial role in making the different political and cultural views on the school system known to the public. Similarly, although they did not turn into proper «parties of the school», the teachers associations took an active part in the debate, above all the *Unione Magistrale Nazionale* (National Teaching Union) led by Giuseppe Lombardo Radice and the *Federazione Insegnanti Scuola Media* (Middle School Teachers Union) established by Salvemini and Kirner at

Bertoni Jovine, *La legge Casati nella critica contemporanea*, «I Problemi della Pedagogia», vol. V, 1959, pp. 77-117). The need was felt for a «radicale ed organica» («radical and consistent») general reform of the school system. However, this urge had already been felt in the early years that followed the unification of Italy. A debate had arisen on illiteracy and the need to educate the largest social classes, based on the idea that massive measures to implement national education would foster the growth of the nation itself. In those years, despite remarkable achievements in the field of education, no real reformist movement was born and Italy was one of the countries with the highest illiteracy rates (See G. Gentile, *Il problema scolastico del dopoguerra*, Napoli 1919, pp. 19-27).

12 See G. Bonetta, *Storia della scuola e delle istituzioni educative. Scuola e processi formativi dal XVIII al XX secolo*, Firenze, Giunti, 1997, pp. 94-100. For further reading, see G. Bonetta, *Genesi e formazione della concezione scolastica gentiliana*, in G. Spadafora (ed.), *Giovanni Gentile. La pedagogia, la scuola. Atti del Convegno di Pedagogia (Catania, 12-13-14 dicembre 1994) e altri studi*, Roma, Armando, 1997, pp. 247-288.

13 G. Gentile, *La politica scolastica del regime*, in *La riforma della scuola in Italia*, III ed. rev. and exp. edited by H. Cavallera, Firenze, Le Lettere, 1989, pp. 341 ff.

the beginning of the 20th century. A few years later, the associations of fathers made their voices heard and participated in the national debate on the school system to be reformed. The intersection between politics on one side and culture and education on the other resulted in «[la] più fascista delle riforme fasciste» («the most fascist of all fascist reforms»), as Mussolini defined the Gentile Reform. On the one hand, the Gentile Reform of 1923 (R.D. n. 1054) was «una delle prime realizzazioni politiche del fascismo, giunto al potere in seguito alla marcia su Roma nell'ottobre del '22» («one of the early political achievements of Fascism, which seized power following the March on Rome in October 1922»)[14]; on the other, the Gentile Reform was anything but a faithful interpretation of the fascist ideology. The school system devised and implemented by the Sicilian philosopher was inspired, as mentioned above, by Hegelian idealism and by the conception of human education as education of individuals in all their dimensions, as education of the spirit[15], in a national school «non […] pel contenuto di sapere scientifico che essa deve accogliere in sé, ma nazionale deve essere in quanto della scienza fa una cultura, uno strumento formativo di coscienze, e insomma un mezzo di educazione dell'uomo e del cittadino» («not […] for the contents of scientific knowledge that it has to include, but national rather in that it turns knowledge into culture, a means to educate minds, and, in short, a means to educate people and citizens»)[16].

The fact is that some ambivalence in Gentile's statements proved to be undeniably advantageous for Mussolini to find the necessary justification for the authoritarian plans of the fascist politics[17] and also disappointed Benedetto Croce who, in writing to the liberal, anti-fascist professor Vittorio Enzo Alfieri on 10 October 1925, accused his friend Gentile of putting his philosophy «al servizio di un partito» («at the service of a party»)[18]. It is also certain that Gentile remained loyal to the Duce until he was assassinated in 1944. And Mussolini rewarded Gentile with trust, and continued to support and defend the 1923 school reform from criticism and students' unrest all over the country[19].

14 M. Bellucci, M. Ciliberto, *La scuola e la pedagogia del fascismo*, Torino, Loescher Editore, 1978, p. 11.

15 See G. Gentile, *La nuova scuola media*, Firenze, Vallecchi Editore, 1925, p. 28: «Ogni educazione umana consiste nella formazione dell'uomo, cioè dello spirito» («Human education involves the whole education of the individual, namely of the spirit»).

16 Gentile, *La Riforma dell'educazione*, cit., p. 11.

17 It is worth considering Gentile's definitions of State found in *Fondamenti della filosofia del diritto* del 1906 and, even early on, his interpretations of the "freedom of education", which paved the way for a conservative approach to the issue of Italian secondary school system (*L'unità della scuola media e la libertà degli studi*, first published in 1902 in «Rivista Filosofica» by Carlo Cantoni, vol. IV, vol. V, pp. 196-217, 331-350, and now available in the complete edition of Giovanni Gentile' works, «OCG», vol. XL, pp. 1-39).

18 B. Croce, *Lettere a Vittorio Enzo Alfieri (1925-1952)*, Milazzo, SPES, 1986.

19 See J. Charnitzky, *Fascismo e scuola. La politica scolastica del Regime (1922-1943)*, Firenze, La Nuova Italia, 1996, pp. 156-177.

In the twenty years from 1922 to 1943, from the fascist seizure of power to the crisis of the regime, education was at the centre of the Italian political life and Mussolini remained highly interested in it until the end. It would suffice to consider that, between 1922 and 1943, nine people served as the Ministers of National Education and that there was a close link – albeit a conflicting one – between social policy and school policy; the latter was embedded in the regime's slogans in favour of breaking class barriers through a reformed school system.

By critically interpreting the primary sources, by reading the large amount of laws passed in the fascist period to regulate the school system, and by analysing decrees and regulations, it can be noted that the reform of the school system in the 1920s was spurred by the need for selecting the ruling classes – an issue that had emerged soon after the unification of Italy. On one side, school enrolment rates had increased thanks to the improved standards of living of the working class and lower middle class; on the other, the school system could be considered to be working efficiently only if it were able to identify and select the features of fascist intelligence[20].

Since the beginning of the 20th century, several factors – such as the works of the Real Committe published in 1909, the Royal Decree of 1911 issued under Minister Luigi Credaro, the 1912 curricula for the *ginnasio* [until 1940 this pathway consisted of a three-year lower *ginnasio*, later replaced by the *scuola media*, and a two-year higher *ginnasio*, where pupils started to study Greek] and the 1913 curricula for new types of *licei*, including the fact that the State took direct control over the primary education system – resulted in the Italian school system to have two different aims: it had to find measures to counter illiteracy and, at the same time, it had to orient an increased student population in choosing the high school pathway that was most suitable for them[21]. This also explains the attempt to preserve the *liceo classico* from the 'pollution', the 'burden' that would have contaminated the school of "the few

[20] At the beginning of the 20th century, more pupils had been enrolled in the secondary school: according to census data, the number of enrolled pupils had increased from 18,231 in 1861 to 181,603 in 1911. This significant increase can be explained with both strictly political reasons and issues related to social order: on the one hand, after 1861, the will to create a strong State urged politicians to allow a large number of pupils into the secondary school system; on the other hand, the increased enrolment rates mainly occurred in central and southern regions of unified Italy, which confirms the «tendenza a ritardare l'ingresso nel mondo del lavoro, in mancanza di adeguate prospettive professionali» («tendency to have pupils enter later the world of work, given the lack of job opportunities») (J. Charnitzky, *Fascismo e scuola*, cit., p. 25). As far as Italy is concerned, a correspondence can be identified between the country's economic development and education standards, above all in the period from the unification of Italy to the early decades of the 20th century. See, above all, V. Zamagni, *Istruzione e sviluppo economico in Italia (1861, 1913)*, in G. Toniolo (ed.), *Lo sviluppo economico italiano 1861-1940*, Roma-Bari, Laterza, 1973, pp. 187-240 e M. Barbagli, *Disoccupazione intellettuale e sistema scolastico in Italia (1859-1973)*, Bologna, il Mulino, 1974, pp. 105-156.

[21] For a general overview of the period, see Bruni, *Greco e latino*, cit., pp. 25-47.

but good ones", i.e., the *liceo classico*. The Gentile Reform tried to tackle this risk and find a solution to lowered secondary school standards, as the works of parliamentary committees had shown[22]. Selection seemed to be the right solution and was inherent to the school's role to orient pupils in choosing the secondary school pathway that was most suitable for them. Giovanni Gentile identified the «sfollamento» («reduction»)[23] as the best solution to the problems of the secondary school system – above all those of *liceo classico*. In order to achieve reduction, most pupils had to be guided to opt for technical schools, thus allowing only the best pupils to access educational pathways where the spirit would be educated thoroughly, namely the school designed to shape the future ruling classes of the Italian society.

Gentile, "the right man in the right place", according to Benedetto Croce, had been a passionate and critical intellectual since he was a student at the University of Pisa[24]; he also knew very well how the school and university systems worked, as he had taught Philosophy in *licei* as well as at the University of Naples first and then at the University of Palermo, and in 1914 he had followed Donato Jaja at the *Scuola Normale Superiore* until he became Professor of History of Philosophy – later Theoretical Philosophy – at the *Sapienza* University of Rome. The 1923 reform can be interpreted as a synthesis of his views on education, of a type of pedagogy that combined Vico's view of history – whereby everything had to be searched through history by comparing historical reality and human reality[25] – with Hegelian idealism of an ethical State in which every individual would feel recognized and identified: «Intesa così la nazione non solo non ci può essere vita d'uomo che non rechi l'impronta della sua nazionalità, ma non c'è

[22] See, G.M. Bertin, *Per la Riforma delle Scuole Medie*, Torino, Libreria Scolastica di Grato Scioldo, 1889; A. Piazzi, *La scuola media e le classi dirigenti (per il riordinamento dell'istruzione secondaria in Italia*), Milano, Ulrico Hoepli, 1903; G. Lombardo Radice, *Studi sulla scuola secondaria*, Catania, Fratelli Battiato librai editori, 1905; A. Galletti, G. Salvemini, *La riforma della scuola media*, Milano-Palermo-Napoli, Remo Sandron Editore, 1908; MPI, *Commissione Reale per l'ordinamento degli studi secondari in Italia*, report I, Roma, Tipografia Ditta Ludovico Cecchini, 1909.

[23] G. Gentile, *Scuola media e liceo moderno*, in Id., *La nuova scuola media*, Firenze, Vallecchi, 1925, pp. 140-141: «La vera malattia […] è l'eccessivo affollamento della presente scuola media classica. Il rimedio pertanto che bisogna sperimentare è lo sfollamento con l'attirare il maggior numero alle scuole, che si vengono ogni giorno creando, commerciali, industriali, professionali, agrarie, tecniche» («The actual disease […] is the too high number of pupils enrolled in present-day traditional middle school. The remedy to experiment is, therefore, the reduction of this number by attracting most pupils to the new types of schools, which are being set up every day, such as pathways for commercial, industrial, professional, agricultural, and technical studies»).

[24] Besides the biography of Gentile by Manlio Di Lalla (*Vita di Giovanni Gentile*, Firenze, Sansoni, 1975) and the one by Gabriele Turi (*Giovanni Gentile. Una biografia*, Firenze, Giunti, 1995), the genesis of Gentile's growth as an intellectual and of the development of his theories on education since he was at university is interestingly illustrated in the essay by Giuseppe Spadafora, *Gentile e la pedagogia (1891-1902)*, in Id. (ed.), *Giovanni Gentile. La pedagogia, la scuola. Atti del Convegno di Pedagogia (Catania, 12-13-14 dicembre 1994) e altri studi*, cit., pp. 129-173.

[25] See G. Gentile, *Studi vichiani*, Messina, Principato,1915.

neanche scienza vera, scienza, voglio dire, che sia scienza d'un uomo, la quale non sia scienza nazionale» («If we assign this meaning to the nation, not only there cannot be any individual's life that does not bear signs of their nationality, but there is not even real knowledge, knowledge – I mean – of a human being, which is not national knowledge»)[26]. The ethical nation was to be built through an educational project that would shape a new type of individual conscience and make every individual's spirit more active and efficient.

Similarly to Hegel, Gentile also deemed art, religion, and philosophy as higher spiritual forms, in that they were functional to a project for educating individuals to acquire rational skills. Differently from positivism – which focused on practical education as well as on practical subjects and contents that could be transferred and applied to work activities –, Gentile's project was exclusively focused on educating the spirit through subjects and contents that did not have any practical usage. Philosophy, Latin and Greek were the core of a teaching philosophy that was meant to ensure the pupils' inner freedom, of a teaching practice that was not aimed to the acquisition of a large amount of subject contents but rather focused on the quality and the unity of knowledge.

The actual administrative and educational reorganization was often related to strategies useful to popularize fascist ideas through the periodical «Educazione Nazionale», and to have intellectuals and teachers join the *Fascio di Educazione Nazionale* (National Education Squad), overtly inspired by Gentile's ideas.

«Bisogna restaurare lo Stato» («The State is to be restored»), asserted Gentile, and it is necessary not to separate this general aim from the special need to reorganize also the school system with the same strength and the same commitment. Indeed, «lo Stato non si restaura se non si restaura la scuola. La scuola non si restaura se non si restaura la famiglia, e nella famiglia l'uomo, che è la sostanza della famiglia, della scuola, dello Stato» («the State cannot be restored unless the school system is restored. School cannot be restored unless the family is restored and, in the family, man, who plays a pivotal role in the family, the school, and the State, has to be restored»)[27].

The pedagogical conception of the education of the new man was part of a changed view on the relationships between the individual and the state authority. The education of the spirit was, therefore, implemented in schools, in all schools, from elementary schools through to classical, scientific, technical, and teacher training schools. The elementary school and the classical school were, however, regarded as proper institutions of culture, where complete spiritual integrity could be attained. Conversely, all the other educational pathways restricted the chances to learn as they provided partial education, i.e., a "specialized" type of education and training. In Gentile's plans, the *liceo*

[26] G. Gentile, *La riforma dell'educazione*, Milano, Treves, 1928, pp. 14 ff.

[27] These are words by Giovanni Gentile, taken from his speech in Rome at the III "Congresso delle donne italiane" on 4 May 1923.

classico was and had to be the best type of school, the only one that could grant access to all university faculties as it provided pupils with robust knowledge of philosophy and humanities, which was fundamental for the addressees to be able to achieve leading positions in society.

On the ground of these principles, classical secondary education appeared as a stronghold that could only be accessed by *aristoi*, the few pupils who were able to continue to study and were interested in culture rather than in gaining a qualification. In order to discourage the masses from attending school – which Gentile regarded as the most evident problem and risk for school and society –, difficult admission exams were introduced to evaluate the results achieved and to ensure that pupils had the requisites to move to the next class. As a result of these exams, pupils did not receive any diploma; in accordance with the guidelines issued by the previous minister Benedetto Croce, there were state exams designed to evaluate the pupil's spiritual achievements through tests on culture. The examination board – consisting of the teachers who had prepared the pupils in class as well as of teachers from the school the pupils were going to enter – did not test the amount of notions acquired; they rather tested the level of education of the spirit that the pupils had achieved[28].

Gentile was mainly concerned with the learning outcomes of middle classes' expectations about climbing the social ladder through education: this factor also explains the increased enrolment rate in technical schools whose population,

[28] As to Latin, and, as to Greek since the fourth year of *ginnasio*, the dual-focused methodology aimed both to improve the pupils' knowledge of history through the study of ancient cultures and to make the teaching of languages a useful tool to learn the inner and the real world of the artist, rather than mere formal analysis. The rejection of formalism, of useless tortuous reflections on grammar, of grammar trifles, of formal analysis that had an end itself, as well as of useless memorization, well mirrored the aim of making classical education adequate and relevant to that historical period. At the same time, it also allowed pupils to improve their verbal skills through logic, which also involves logical thinking, because «l'espressione non è vaghezza del reale, ma essenza della spiritualità» («verbal expression does not imply a vague representation of reality, but it is the essence of spirituality»). Consequently, it is neceassry that «il candidato si sappia esprimere bene» («the candidate can speak eloquently»), since it is «la prima cosa che l'esaminatore richiederà» («the foremost feature that the examiner will evaluate») (*Avvertenze* ai programmi d'esame di ammissione alla 1ª classe liceale. R.D. 14 ottobre 1923, n. 2345). The same guidelines were clearly and firmly confirmed for the study of Greek, which was regarded as *idem et continuum* of Latin; it was even more clearly stated that reading texts had to be the core of teaching, which «deve sempre più distaccarsi dal puro esercizio di traduzione per essere presentazione della vita classica nel suo spirito e nei suoi istituti» («is not to be meant as a mere translation activity, but it has to present the spirit and the institutions of Classical life»). In the *Avvertenze*, moreover, it is also stated that «anche l'esaminatore deve sapersi esprimere. È un suo dovere morale. Chiarezza di domande, chiarezza di risposte. Ed insieme, senso della bellezza di ciò che si è letto. Ma questo senso non può venire se non dall'intendere ciò che si è letto, dal rivivere la vita dello scrittore nella sua pienezza» («the examiner too must be able to speak eloquently. It is his moral duty. Clear questions, clear answers. Besides, the awareness that they have read a refined text. But this awareness can only come from the full understanding of what has been read, from fully identifying oneself with the author and his life»).

over a few decades, equalled the one of *licei*. The Casati Law classified technical education – divided into lower (technical school, a three-year pathway) and upper (technical institute, a three-year pathway) – as one of the secondary school types that were meant to «dare ai giovani che intendono dedicarsi a determinate carriere del pubblico servizio, alle industrie, ai commerci ed alla condotta delle cose agrarie, la conveniente cultura generale e speciale» («provide the suitable general and specialized education to pupils who want to look for careers in the public sector, in factories, in commerce and in agricultural activities»)[29].

As this type of school provided general knowledge – through very dense syllabi and curricula for the weakest students, but with the advantage that pupils could achieve a diploma one year earlier compared to pupils in *licei* and without having to study Latin –, the number of pupils who opted for this type of school became increasingly higher in the late 19th century and in the early 20th century. The belief that it was possible to enter the world of work without the difficulties encountered in a rigorous education path and, at the same time, the widespread wish to find a job[30] were having a negative impact on classical schools, which were reserved to upper class pupils. All this raised Gentile's urge, which was shared by those who had similar views on philosophy and education, to restore a system of selection in schools that would allow only good pupils to attend *licei*.

In line with Gentile's idealistic principles, «poche, ma buone» («few but good schools»), or better, «poche, ma scuole» («few, but actual schools»)[31] had to be designed to educate the pupils "destined to become the leaders of society"; consequently, the number of pupils in *licei* and of university students had to be reduced. This was one of the fundamental principles that inspired the Committee's works, between 1910 and 1914, to devise a school reform that would also include university education. It was often being highlighted that the university system was affected by a widespread tendency to promote the study of useful and practical contents to the detriment of the culture-based and deeply liberal studies that had always been central to classical education. The Gentile Reform made the *liceo classico* an elite school, just as Casati had designed it, a type of school that would necessarily exclude weaker pupils and those who simply wanted to achieve a diploma. The *liceo classico* became an aristocratic

[29] Art. 272, Titolo IV, Casati Law on the public education system: R.D. 13 November 1859, n. 3725. On the text of the Law, see G. Inzerillo, *Storia della politica scolastica in Italia*, Roma, Editori Riuniti, 1974, pp. 157-231; G. Talamo, *La scuola dalla legge Casati alla inchiesta del 1864*, Milano, Giuffrè,1960, pp. 71-83; for the analysis of the secondary school system, above all the technical school, both in the Casati Law and in the subsequent ones, see L. Ambrosoli, *La scuola secondaria*, in G. Cives (ed.), *La scuola italiana dall'unità ai giorni nostri*, Firenze, La Nuova Italia, 1990, pp. 105-145.

[30] MPI, *Commissione Reale per il riordinamento degli studi superiori. Relazioni e proposte*, cit., I, p. 261.

[31] For further reading, see the above-mentioned volume by Dina Bertoni Jovine, which contains an entire paragraph on this topic (pp. 222-234).

school, for the full education of the spirit, a school that – thanks to the mingling of classical languages and cultures, liberal teaching free from utilitarian aims – allowed every pupil to fully develop their spirit[32]. And, similarly to the one designed by Casati, the *liceo classico* became again the "School", the only school that allowed pupils to choose any university faculty. The abolition of the secondary school of modern languages by decree n. 564 clearly showed the wish to restore the glorious status of *liceo*. And, on the same ground, suitable alternatives to *liceo classico* were designed: technical education[33], in particular, was reorganized into lower technical institute and upper technical institute, both four-year pathways; *istituti magistrali* were created for training elementary school teachers; the *liceo femminile triennale*[34] [a three-year *liceo* for girls] and

[32] *Avvertenze* to the syllabi for the 4th year of *ginnasio*: «Fin dall'inizio il liceo-ginnasio dev'essere un istituto di coltura umanistico-storica: prepara agli alti uffici della vita civile, alle professioni libere, alla vita politica, prepara da lontano, preparando l'uomo: l'uomo morale, che è a suo posto nella Storia, e perciò, sa il travaglio faticoso dell'umanità dalla spelonca in cui visse selvaggio a quella civiltà che non consiste nei perfezionamenti tecnici così appariscenti nella nostra vita moderna, fino al punto di apparire fini e non mezzi, ma consiste nella più profonda comunione di animi, nel più profondo senso della libertà e del dovere umano, nella più profonda coscienza della propria personalità. L'insegnamento umanistico, senza perdere il suo carattere estetico, deve, perciò, farsi più storico. L'uomo è personalità in quanto si esprime ed intende l'espressione e, quindi, comunica, e comunicando si accomuna con gli altri uomini». («Since the beginning, the *liceo-ginnasio* must be a school of humanities: it prepares individuals to serve as high civil officers, to take part in political life, prepares from distance, prepares man: the moral man, who has a place in History, and therefore, knows how difficult has been to move from the cave in which he lived as a savage to civilization which does not result from the technological advancements – which are so striking in our modern lives that they may seem to be the goal rather than the means of achieving goals –, but it rather results from deep harmony of souls, from the deepest sense of freedom and duty, from the deepest awareness of one's own personality. Teaching humanities, therefore, must become more adherent to present-day history, without losing its aesthetical dimension. Man is a personality inasmuch as he expresses himself and understands other individuals' expression and, therefore, he communicates, and by communicating he becomes part of a community together with other men»).

[33] The Gentile Reform had raised to five years the duration of elementary school and to four years the duration of the lower technical institute. This meant that pupils had more solid fundamentals when they enrolled in higher technical institute.

[34] The *liceo femminile* was established by D. 6 May 1923, n. 1054 (Titolo I, cap. 7). The following subjects were taught: Italian Language and Literature; Latin Language and Literature; History and Geography; Philosophy, Law, and Politics; Art History (optional); French Language (optional); German and English Language; Drawing; Music, Singing and Dance; Musical Instrument (optional); Female Work and Household Economy. The total weekly hours were 24 in the first and second year and 23 in the third year. The number of hours rose to 34 if optional subjects were included. Nonetheless, by attending the *liceo femminile*, which allowed upper class girls to complete their four-year middle school studies, pupils did not achieve any type of diploma and they were not entitled to enrol in university. It was devised as a school that offered no real career opportunities and, for this reason, in the school year 1928-29 all the *licei femminili* were closed, as further proof of the fact that this type of school and the education it provided were a failure. It was the effect of «un errore da siciliano» (a mistake made by a Sicilian), as Prezzolinì offensively defined it in 1925 (See A. Casati, G. Prezzolini, *Carteggio (1911-1944)*, edited by D. Continati, Roma, Ed. di Storia e Letteratura, 1990, Vol. II, p. 453).

the *liceo scientifico* – derived by modifying the track of the technical institute[35] based on physics and mathematics – were established, too.

Based on the idea of drastic selection, pupils could achieve their diplomas only through constant commitment and hard study and dedication in order to pass the several tests that began with the admission test to the first year of *ginnasio*[36], in which the Latin language was the most studied subject: eight hours per week compared to seven hours devoted to the study of the Italian language, one hour devoted to maths and five hours devoted to history and geography, which were treated as one subject in the five years of *ginnasio*, in the lower technical institute and in the *istituto magistrale* [a type of secondary school for teacher training], as well as in the three years of *liceo femminile*.

In the 1923 reform of middle school, the novelty from the perspective of teaching was the proposal – perfectly in line with the philosophical and pedagogical vision of the minister – of "free" curricula, in which the stress was placed on learning objectives rather than on the components of the programme that the teacher had to follow passively[37].

[35] As a matter of fact, the *liceo scientifico* was conceived of as a school that could be an alternative to *liceo classico*, with a curriculum based on humanities. For this reason, it is more similar to present-day *ginnasio-liceo* than to the track of the technical institute based on physics and mathematics. For further reading on this topic, see MPI, *Dalla Riforma Gentile alla Carta della Scuola*, Firenze, Vallecchi Editore 1941, p. 183.

[36] An admission test was compulsory to access every middle school pathway, except for the complementary school.

[37] «In ciascun istituto, alla fine dell'anno scolastico e non più tardi del 30 giugno, il Collegio dei professori sceglierà, su proposta del professore della classe e della materia, i libri di testo e stabilirà, inoltre, la parte dei programmi da trattare nelle singole classi, per le singole materie, in modo tale che al termine del corso gli alunni siano pronti a sostenere l'esame prescritto. Per ciò che riguarda la scelta dei libri di testo la proposta del competente professore si intenderà approvata dal Collegio quando abbia raccolto i suffragi favorevoli d'un terzo dei votanti» («In every school, at the end of the school year, not later than 30 June, the *Collegio dei professori* – that is, the *Teaching Body* – will choose, on a proposal of the subject teacher, the textbooks and, moreover, they will identify the part of the syllabi to be studied in each class, for each subject, so that, by the end of the pathway, the pupils will be prepared to take the final exam. As to the choice of textbooks, the subject teacher's proposal will need to be approved by one third of voting members in the *Collegio*») (Art. 3 of the R.D. 14 October 1923, n. 2345). It was acknowledged that teachers had the necessary competence to accomplish their pedagogical tasks, the ability to identify the most suitable teaching principles and methodologies and, therefore, the attitude to develop a suitable programme that included the Ministry guideline principles.

3. *School and race: the selection in the «superlativamente» («superbly»)*[38] *fascist school*

Bottai's school reform seems, in retrospect, to have been a failed attempt of the fascist regime to educate young Italians "through experiments", despite the propaganda campaign as well as the constant support it received in the fields of politics, pedagogy, and school. Historians have no doubts that the fascist programme had a limited impact on Italian culture – and critical studies confirm this theory. Certainly, the imperial cult of the Duce through the indoctrination of youth since they were little children left a mark, but it must be noticed – as Michel Ostenc purports – that «i giovani apparivano molto più fascistizzati nel comportamento che nella cultura» («young people appeared to be much more fascistized in their behaviour than in their culture] so that «Quando la prova della guerra spezza il legame carismatico e abbatte il colosso dai piedi d'argilla, tutto un umanesimo riappare, tutta una sensibilità artistica e culturale emerge dal più profondo dell'essere per ricacciare indietro la dittatura e l'asservimento»[39] («when the war breaks the charismatic bond and tears down the giant with feet of clay, a humanistic culture, an artistic and cultural sensibility emerged from the bottom of souls to reject dictatorship and subjugation»). However, there is no doubt that party officials and intellectuals loyal to the regime constantly worked to promote the accordance between school and Fascism. Similarly, it is undeniable that Giuseppe Bottai was the author of the real, complete fascist reform of the Italian school[40].

The selection of the elites of the nation was presented as a need for the State and, therefore, it remained the priority of the regime; although the regime constantly proposed the slogan stating that school promoted social advancement and propagandized the will to "support the people", as a matter of fact, from 1936 to 1943, the Italian school was, above all, a place for selection. The introduction of work into schools had the same levelling function. The fact that Latin was the central subject in the middle school was functional to the aim of selecting pupils through a school system devised as a social and political device to separate everyone's physical and mental aptitudes, and safeguard the special traits of everyone and of the diverse social classes. The *liceo classico* became even more rigorous than it had been under Gentile and the school became clearly selective, anti-liberal, and conservative[41]; the classical and humanistic

[38] Taken from Giovanni Gentile's own words, published in the article *Vox Clamantis*, signed A.Z. in the periodical *Leonardo* (*Opere Complete di Gentile*, edited by Fondazione Giovanni Gentile per gli studi filosofici, Firenze, Le Lettere, 1988, vol. XLI, p. 445).

[39] M. Ostenc, *La scuola italiana durante il Fascismo*, Roma-Bari, Laterza, 1980, p. 273.

[40] See R. De Felice, *Preface* to T.M. Mazzatosta, *Il regime fascista tra educazione e propaganda (1935-1943)*, Bologna, Cappelli, 1978.

[41] It is worth reading Luigi Volpicelli's enthusiastic comments (*Commento alla Carta della Scuola*, Istituto nazionale di cultura fascista, Roma 1940) and the articles by Nazareno Padellaro

culture – since it also promoted the defence of Latin tradition values – was misused to fascistize the Italian school and society; obviously, it was deeply modified and bent to the regime's own ends. The main aim of the school devised by Gentile, that is, the education of the spirit, was forgotten and so was the desire to promote an unbiased culture that could develop the inner qualities of individuals and their critical thinking, which led to freedom of mind.

Conversely, the educational model, introduced under De Vecchi and completed by the following Minister Bottai, was based on professionalization, which seemed to be suitable for a society that required the school to prepare pupils for the world of work and to address those social classes – lower middle classes – that were against the process of selecting pupils and excluding some from specific activities and professions, which were reserved to the few belonging to one social class.

On closer inspection, during the Thirties, the main features of the plan devised by Gentile had not been modified, despite Bottai's reform and the policy of adjustments. The actual "betrayal" of Gentile's plan went beyond the changes made to the process of selection as well as to the syllabi and the total hours of study; Gentile's reform was altered in its nature, in its conception of the school-politics pairing and, therefore, in the conception of the relation between education and practical, political, and corporative training. The problem was indeed the middle segment of school and education, which, in those particular years, needed structural unity.

In his speech *Sul bilancio dell'Educazione Nazionale* (On the Analysis of National Education), given at the Chamber of Deputies on 17 March 1937[42], the concepts of unity and active life, and of work-based life, called for the creation of a middle segment, not to be derived from the simple mingling of classical and technical contents, from a «miscela [che] può, a lungo andare, darci davvero una cultura 'media' […] nel senso di 'mediocre'» («mixture [that], in the long run, can result in 'average' culture […] meaning 'mediocre'»)[43], but rather from social, national and political needs.

The most striking change under Bottai was the proposal to create a unified middle school, which, in the minister's mind and in the Duce's plan, would have a prestigious social role. Indeed, the middle school was designed to address pupils belonging to small and middle bourgeoisie, in order to ensure that they could advance socially and that the social classes that best supported Fascism could be educated. As a matter of fact, putting together the *ginnasio*, the lower technical institute and the *istituto magistrale* to establish the middle school

on the selective nature of the *Carta della Scuola* that appeared in the periodical *Primato educativo*, which he directed since 1934. See Padellaro's *Fascismo educatore*, Roma, Cremonese Libraio Editore, 1938.

[42] The text of the report can be read in G. Bottai, *La nuova scuola media*, Firenze, Sansoni, 1941, pp. 31-34.

[43] *Ibid.*, p. 32.

proved far from being democratic. Bottai's middle school was clearly selective: the teaching of Latin still had the function of identifying the best pupils – but was different from Gentile's teaching of Latin that was everywhere – and a rigorous admission exam played the levelling role[44].

Bottai's perspective on Italy was different from Gentile's: the focus was not on a peasant Country; it was rather on a growing State and on an industrial society that needed an education system that would be suitable to that period. And the regime's policy on school was affected, on the one hand, by the principles of order and virtue that the fascist regime used to mobilize the Italians in the name of the defence of the nation and the race and, on the other hand, by the socio-biological ideas promoted by the eugenics movement since the March on Rome[45]. The anthropologic regeneration fostered by Fascism to modernize Italy and move it away from traditional elites, which had lost their manly strength, was accompanied and reinforced by the biologic regeneration of doctors and eugenicists, whose positions were synthetized by the Sicilian journalist Telesio Interlandi in the pages of the fortnightly magazine *Difesa della razza* and during the 1920s in the pages of the newspaper «Il Tevere», since 1923 when he became chief editor of the «Impero», and since 1933 of the weekly cultural magazine «Quadrivio». Interlandi, Mussolini's "unofficial" spokesperson since 1924, played a key role in favouring – almost preparing – the progressive spread of racist ideas and practices into all fields of Italian society, above all, into culture and education[46].

44 For further reading on the topic, see *Atti del V convegno di studi 'La Scuola Media'*, Padova, Biblioteca del Centro Didattico di Padova, Società Cooperativa Tipografica, Anno 1941, pp. 49-77. It includes the speech of Professor Attilio Dal Zotto – head teacher of the *Regio liceo-ginnasio Tito Livio* – titled *L'insegnamento del latino come strumento di selezione*. In order to fully appreciate what establishing the middle school with Latin in 1939 meant, see G. Bottai, *Vitalità e funzione del latino nella nuova scuola media*, Roma, Istituto di studi romani, 1942.

45 See Emilio Gentile's studies on the topic: *Il mito dello Stato nuovo dall'antigiolittismo al fascismo*, Roma-Bari, Laterza, 1982 and *Fascismo. Storia e interpretazione*, Roma-Bari, Laterza,2002, mainly the chapter *L''uomo nuovo' del fascismo. Riflessioni su un esperimento totalitario di rivoluzione antropologica*, pp. 235-264. For an overview of the spread of racial prejudices and the rise of racism in politics, see M. Loré, *Antisemitismo e razzismo ne* La Difesa della Razza *(1938-1943)*, Soveria Mannelli, Rubettino, 2008.

46 F. Cassata, *«La Difesa della razza». Politica, ideologia e immagine del razzismo fascista*, Torino, Einaudi, 2008, p. XII: «[…] il ruolo di 'portavoce ufficioso' di Mussolini, a partire dal 1924, colloca Interlandi in una posizione del tutto atipica e assolutamente imprescindibile: […] le campagne del 'Tevere' e del 'Quadrivio' svolgono, infatti, in varie occasioni, la funzione di battistrada delle scelte politiche del dittatore in materia di razzismo e antisemitismo, rivelandosi pertanto particolarmente utili nell'analisi della lenta e complessa maturazione di quella opzione biologica che contraddistinguerà l'impianto complessivo del cosiddetto *Manifesto della razza*, nel luglio del 1938, e che terrà a battesimo, con il diretto intervento di Mussolini, la nascita della 'Difesa della razza', nell'agosto dello stesso anno» («[…] his role as Mussolini's 'unofficial spokesperson', since 1924, makes Interlandi's position completely atypical and absolutely crucial: […] the 'Tevere' and 'Quadrivio' campaigns, indeed, set the pace on many occasions for the dictator's political choices with regard to racism and anti-Semitism, thus proving to be particularly useful to analyse the slow and complex development of the biological option that would characterize the underlying

The *Manifesto della razza* (Manifesto of Race) of July 1938 was mainly prepared by what Francesco Cassata defined as the «lobby interlandiana» («Interlandi's lobby»)[47] and mirrors the close relationship between Fascism and the eugenics movement promoted by doctors – above all club doctors – and some scholars which wrote for the magazine «Difesa Sociale»[48]. Fascism and eugenics mainly shared the idea of the necessary preservation and regeneration of the Latin descent, the Italian spirit, and the warrior nation. These matters led Mussolini to foster policies inspired by environmental eugenics, i.e., a type of eugenics aimed to reinvigorate the youth that had been weakened by middle class spirit and mentality: the effects were special attention to demographic policies, the rebirth of such traditional values as maternity, marital fidelity, procreation, physical exercise, patriotism, national pride, bravery and discipline[49], a detailed organization of the education system from infancy to 18 years to "educate man completely", «l'Uomo nuovo che dirige le sorti della nuova Italia» («the new Man that will lead the new Italy»)[50], the Italian man of «Rinascenza» («Rebirth»)[51].

principles of the so-called *Manifesto of Race* of July 1938, and that would lead – as a result of Mussolini's direct intervention – to the foundation of the magazine 'Difesa della razza' in August 1938»).

[47] *Ibid*. It must be noted that intellectuals and scientists had different, often conflicting, views on fascist racism. The «Difesa della razza» represents and interprets the theories of the so-called biological racism, which were very different from the more spiritualistic and nationalistic positions (for example, of Pende or Visco) or exoteric ones (particularly Evola's position). In the above-mentioned volume, Cassata writes that «Se si passa tuttavia dal livello politico a quello più propriamente ideologico, le linee di frattura si attenuano, lasciando spazio ad un sincretismo nel quale, in estrema sintesi, la biologia si culturalizza e la cultura si biologizza» («Moving from the political perspective to the ideological one, the differences fade away, and result in syncretism whereby biology becomes culture and culture becomes biology») (p. XIII).

[48] It is worth reading Mussolini's speech to doctors in 1931, where he used images typical of social and preventive medicine: «Il medico è come il sacerdote: accompagna l'uomo dal principio alla fine. Il sacerdote tutela la nostra anima e fa in modo che sia degna della beatitudine ultraterrena. Il medico ci protegge la salute del corpo che, anch'essa è essenziale, tanto è vero che quando non c'è si fa tutto il possibile per recuperarla. Ma su questo settore bisogna soprattutto, a mio avviso, prevenire» («The doctor is like a priest: he accompanies man from the beginning to the end. The priest takes care of our souls and makes it worth of the afterlife. The doctor takes care of the health of our bodies, which is also essential, so that, when we are not in good health conditions, we do our best to recover. But in this field, I think that prevention, above all, is necessary») (*Opera Omnia di Benito Mussolini*, cit., vol. XXV, p. 58). See also the speech reported by G. Turi in *Libere professioni e fascismo*, Milano, FrancoAngeli, 1994, p. 87.

[49] For further reading, see C. Ipsen, *Demografia totalitaria. Il problema della popolazione nell'Italia fascista*, Bologna, il Mulino, 1992. On the fascist policy on family, see V. De Grazia, *How fascism ruled women. Italy 1922-1945*, Berkeley and Los Angeles, University of California Press, 1992.

[50] E. Levi, *Alle radici dei mali sociali: il fascismo alla prova*, «Difesa Sociale», vol. 1, 1923, pp. 1-4.

[51] *Opera Omnia di Benito Mussolini*, cit., vol. XXI, p. 362. With reference to Benito Mussolini's words pronounced in his speech of 22 May 1925 at the end of the fourth national congress of the Fascist National party, Jürgen Charnitzky rightly comments that «fascismo, da ideologia politica

Consequently, hygiene, the body, health, the physical and spiritual strength of each individual and of the entire people, were central to the fascist policies[52]; the Italian eugenics theories – very different from the Anglo-Saxon or the Teutonic ones – had an impact in supporting social propaganda and pedagogical principles in the schools of the Country and in the fascist youth organizations, above all in the *Opera Nazionale Balilla* and, later, in the *Gioventù del Littorio*. Real strength, action, power, the imperial *vis*, the quasi-utopian faith of moral regeneration, the enhancement of the race were all values as well as behavioural norms underlying the fascist regime's policies on the school system. By means of dense legislation and a rigorous educational system – characterized by military traits and obsessive administrative and teaching organization – the «selezione metodica» («systematic selection») of Italian youth was implemented, the selection of «generazioni di laboratorio» («generations made in laboratories») shaped to make Mussolini's Italy great and create «imperi» («empires»)[53]. The whole process was completed in three stages: the first stage was marked by Gentile's ideas, the second by the school policies of adjustments, and the final stage was characterised by the school reform introduced by Giuseppe Bottai and Carlo Alberto Biggini, the latter Minister of National Education from February to July 1943.

Since 1937 and at the beginning of 1938, the fascist programme for the «difesa della razza» («defence of the race») was implemented through an anti-Semitic cultural plan and a series of measures that mainly involved schools and universities, and that were very different from those taken in other European countries. Such factors as the alliance with Germany in 1937, the *Manifesto of Race* in 1938, the *Italian Racial Laws*, the criticism and some anti-Semitic

e sistema di potere, doveva trasformarsi in "modo di vita"» («Fascism had to turn from a political ideology and a system of power into 'a way of life'), so that Mussolini's human model became purely utopian»). See Charnitzky, *Fascismo e scuola*, cit., pp. 291-292.

52 See G. Bonetta, *L'assistenza sociale, sanitaria, alimentare e la salute pubblica*, in G. Talamo, G. Bonetta, *Roma nel Novecento. Da Giolitti alla Repubblica*, Bologna, Istituto Nazionale di Studi Romani (volume XXXI), Cappelli Editore, 1987, pp. 433-460.

53 *Opera Omnia di Benito Mussolini*, cit., vol. XXI, p. 363: «Ed è attraverso questa selezione metodica che si creano le grandi categorie, le quali a loro volta creano gli imperi» («And it is through this systematic selection that great categories are created which, in their turn, create empires»).

positions like that of Padre Agostino Gemelli[54], the debate on national identity[55], the new *Documento* that replaced the *Manifesto* approved by the council on 25 April 1942[56], the biased manipulation of teaching contents and Bottai's rigid

[54] See the markedly anti-Semitic speech given by Agostino Gemelli at a Conference on William of Saliceto – a 13th-century doctor – which was held in Bologna on 9 January 1939. Some passages show the Franciscan friar's clear position: in the Bologna speech, he stated that the Jews «non possono far parte, e per il loro sangue e per la loro religione, di questa magnifica patria; tragica situazione in cui vediamo una volta di più, come molte altre nei secoli, attuarsi quella terribile sentenza che il popolo deicida ha chiesto su di sé e per la quale va ramingo per il mondo, incapace di trovare la pace di una patria, mentre le conseguenze dell'orribile delitto lo perseguitano dovunque e in ogni tempo» («because of their blood and their religion, cannot be part of this great fatherland; a tragic situation once more reflecting the terrible sentence that the deicidal people called upon itself: to wander without the peace of a fatherland, persecuted by the consequences of their horrible crime»). And in 1924, Agostino Gemelli thus commented – first anonimously, then overtly – on the death of Felice Momigliano, a philosopher of Jewish origins: «Un ebreo, professore di scuole medie, gran filosofo, grande socialista, Felice Momigliano, è morto suicida. I giornalisti senza spina dorsale hanno scritto necrologi piagnucolosi. Qualcuno ha accennato che era il Rettore dell'Università Mazziniana. Qualche altro ha ricordato che era un positivista in ritardo. Ma se insieme con il Positivismo, il Socialismo, il Libero Pensiero, e con il Momigliano morissero tutti i Giudei che continuano l'opera dei Giudei che hanno crocifisso Nostro Signore, non è vero che al mondo si starebbe meglio? Sarebbe una liberazione, ancora più completa se, prima di morire, pentiti, chiedessero l'acqua del Battesimo» («A Jew, a high school teacher, a great philosopher, a great socialist, Felice Momigliano, has died a suicide. Spineless journalists have written tearful obituaries. Someone has mentioned that he was the Chancellor of the Università Mazziniana. Someone else has commemorated him as a late positivist. But if, together with Positivism, Socialism, Freethought, with Momigliano, death came for all the Jews who are carrying on the work of those Jews who crucified Our Lord, isn't it true that the world would be a better place? It would be an even more complete liberation if, before dying, they repented and asked for the water of Baptism») in «Vita e Pensiero», vol. X, n. 8, 1924, p. 506). On Agostino Gemelli and his bond with the regime, see M. Bocci, *Agostino Gemelli rettore e francescano. Chiesa, regime, democrazia*, Brescia, Morcelliana, 2003 and G. Miccoli, *Padre Agostino Gemelli, Università cattolica e regime fascista*, «Studi Storici», vol. 45, n. 2, apr-jun 2004, pp. 609-624.

[55] In order to fully understand the intellectual debate on national identity and the concepts of race and racism, it is necessary to refer to the magazines of the time, which are major sources. See the articles published in «Difesa della razza» (above all, those by Julius Evola, Nicola Pende, Guido Landra, Ugo Redanò, Giuseppe A. Longo), «Lo Stato» (mainly by Carlo Costamagna), «Critica fascista», «La vita italiana» (for example, the opinions expressed by Giovanni Preziosi, Giacomo Acerbo, Massimo Scaligero), «Razza e civiltà» (articles by Antonio Le Pera, Giuseppe Lampis, Carlo Bergamaschi, Sergio Sergi, Livio Livi, Corrado Gini), «Rassegna sociale dell'Africa italiana», «Bibliografia fascista», «Rivista di psicologia» (interesting articles by Mario Canella), «Il pensiero sanitario», «Il nuovo Stato», «Vita universitaria» (opinions by Edoardo Zavattari, Sabato Visco), «Nuova antologia» (articles by Nicolò Castellino), «L'economia italiana» (articles by Franco De Agazio), «Difesa sociale» (opinions by Ferdinando Enrico Loffredo), and «Genus».

[56] The *Manifesto of Race* was issued on 14 July 1938 and made scientific racism and racist politics official in the whole Country. It was highly debated and caused opposing feelings and reactions amongst Italian intellectuals. At the same time, it also caused political and religious problems with regard to the Jewish question, which, following the Spanish Civil War, had reignited tension between Fascism and anti-Franco international Jewish communities. It is worth keeping the two topics, racism and anti-Semitism, separated. As far as racism is concerned, theories and positions were quite complex; therefore, it is necessary to analyse carefully the real nature of Italian racism, which most scientists conceived of as a type of spiritual racism rather than biological racism,

guidelines on textbooks (*versus* manuals)[57] for the school year 1942-1943, formed the basis of the growth and, at the same time, of the degeneration of the fascist school[58].

and certainly different from German racism. It must be underscored that the text literally recalls and refers to Nordic racism: «il razzismo è una concezione puramente biologica, esiste una pura razza italiana ed è di origine ariana, la civiltà italiana non ha alcun debito con le razze di origine africana, la concezione del razzismo in Italia deve essere di indirizzo ariano-nordico, gli ebrei sono una razza non europea inassimilabile, la purezza della razza italiana non deve essere in alcun modo inquinata» («racism is a purely biological concept, there exist a pure Italian race and it is of Aryan origins, Italian culture has nothing to do with races of African origins, the concept of racism in Italy must refer to Aryan-Nordic racism, the Jews are a non-European race that cannot be integrated, the purity of the Italian race must not be contaminated anyhow») (R. Maiocchi, *Scienza italiana e razzismo fascista*, Scandicci (Firenze), La Nuova Italia, 1999, p. 225). It is also important, however, to remember that the theories illustrated in the *Manifesto* were certainly dictated by the Duce, so that the signers are clearly identified as being mere "front men". Later Nicola Pende and Sabato Visco even protested; on several occasions, Pende illustrated his theory on the concept of race and severely criticized the eugenics promoted by German racists. Like many other intellectuals and scientists, Pende supported a dynamic and evolutionary idea of the race as opposed to the Nordic biologic mechanism. He promoted the concept of "Italic type", the historical-linguistic origins of the people, and the role of Rome in historical processes in order to underline the Roman-Italic unity (N. Pende, *Documenti contro l'accusa di antisemitismo*, Roma, SAET, 1961). In the magazine *La civiltà cattolica*, these differences were reaffirmed: «Chi ha presente le tesi del razzismo tedesco, rileverà subito la notevole divergenza di queste proposte da queste del "gruppo di studiosi fascisti" italiani. Questo riconfermerebbe che il fascismo italiano non vuole confondersi con il nazismo o razzismo tedesco intrinsecamente ed esplicitamente materialistico e anticristiano» («Those who bear in mind the theories of German racism will immediately notice the remarkable difference of these proposals from the ones made by the Italian 'group of fascist scholars'. This would confirm that Italian fascism must not be confused with Nazism or German racism, which is intrinsically and explicitly materialistic and anti-Christian») (LXXXIX, 1938). Most Italian scientists distanced themselves from German racism, which focused on blood and biological determinism. Italian racism was spiritualistic, open to evolution rather than concentrated on fatalism (See G. Landra, *Il concetto di razza*, «Difesa della razza», vol. II, n. 9, 5 March 1939). With regard to the Jewish question, the analysis of the different positions and the compromising behaviour of the Church with the regime, mainly after Pope Pius XI's death, reveals, alongside with commonplaces and anti-Semitic *topoi*, religion-based discriminatory behaviours and opinions, so that such factors as the Jews' tendency to avoid integration in several countries, their tendency to social climbing, the accuse of being masons, their morbid interest in money and power – i.e., all political rather than racial aspects – were often highlighted. When in 1942 a more moderate version of the *Manifesto* was approved by a group of scientists, including Sergio Sergi, Corrado Gini, Livio Livi, Giuseppe Tallarico, the new *Documento* was criticized and opposed by the most radical fringe, who defended the catastrophic theories of German racism, at a time when the most atrocious phase of WWII was being prepared.

[57] See G. Bottai, *La Nuova Scuola Media*, Firenze, Sansoni, 1941, p. 142. On the topic of textbooks in the fascist period, see the detailed works by A. Ascenzi, R. Sani (edd.), *Il libro per la scuola tra idealismo e fascismo*, Milano, Vita e Pensiero, 2005 and Idd., *Il libro per la scuola nel ventennio fascista. La normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica, 2009.

[58] It is worth analysing the changes to the school system made when Carlo Alberto Biggini served as the Minister of National Education after Bottai. He was first the Minister of National Education from 6 February to 25 July 1943, then one of the main exponents of the Italian Social Republic. Under Biggini, on the on hand, the school system was made more similar to the one

designed by Gentile; on the other, the teaching of Latin in all four *licei* (*classico, scientifico, artistico* and *magistrale*) – where pupils were admitted after completing three years of *ginnasio* that had replaced the middle school devised by Bottai – was, once again, used to select pupils in an even more rigorous way.

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Garibaldi narrato e celebrato nelle scuole elementari nel primo centenario della nascita (1907). Il caso di Milano*

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Garibaldi as narrated and celebrated in primary schools on the first centenary of his birth (1907). Milan as a case study

ABSTRACT: Among the events planned to mark the first centenary of Garibaldi's birth (4 July 1907), the municipal authorities in Milan organized a special commemorative program for the city's elementary schools, including lectures at individual schools, the distribution of Storia dei Mille narrata ai giovinetti [History of the Thousand as told to young people] by Giuseppe Cesare Abba, and the parading of a delegation of elementary students in front of the Garibaldi monument in Largo Cairoli. Numerous scholarly publications have examined perceptions of Garibaldi and the impact of the mythography surrounding him in post-Unification Italy. In recent years, key analyses have been undertaken – within broader inquiry into the development of a civic religion for the newly united nation – on how this religion was introduced into schools and how the education system contributed to shaping a national identity. No existing study, however, has examined the role of schools in building up a public image of the "hero of two worlds" as part of the effort to construct a shared memory of the national unification process. This essay is intended to fill that gap, albeit only in part, by presenting research on the involvement of elementary schools, specifically in the city of Milan, in commemorations of Garibaldi on the first centenary of his birth. The primary focus of the study was to investigate the image of Garibaldi transmitted by elementary teachers in the classroom. To this end, contemporary education journals published locally

* Si precisa che l'articolo è stato condiviso dalle autrici, ma che i paragrafi 1 e 2 sono stati redatti da Giulia Gadolini e che i paragrafi 3 e 4 e le conclusioni sono stati scritti da Carla Ghizzoni. La *Premessa* è esito di un lavoro comune.

in Milan – as well as those with national circulation that were likely to have been consumed by the city's elementary teachers – were analysed with a view to reconstructing the cultural message then on offer about Garibaldi.

EET/TEE KEYWORDS: History of school; Primary schooks; Garibaldi; Milan, XXth Century.

Premessa

In occasione della celebrazione del primo centenario della nascita di Garibaldi (4 luglio 1907), il Comune di Milano coinvolse le scuole elementari cittadine in una speciale commemorazione che prevedeva più iniziative in programma fra maggio e giugno e che comprendevano, tra l'altro, lo svolgimento di apposite conferenze presso le singole scuole, la distribuzione della *Storia dei Mille narrata ai giovinetti* scritta da Giuseppe Cesare Abba[1], la sfilata di una rappresentanza degli alunni davanti al monumento di Garibaldi in largo Cairoli. Il reperimento della corrispondenza fra l'amministrazione, Abba e l'editore Bemporad e di numerose lettere scritte dai ragazzi all'assessore alla Pubblica Istruzione Edoardo Mojana come ringraziamento per il dono loro fatto, ha offerto l'occasione per cercare di approfondire non solo quell'evento, ma, più in generale, la partecipazione delle scuole alla rievocazione della figura di Garibaldi e alla costruzione e trasmissione del suo mito. Già molte ricerche, come è noto, inserendosi nel filone degli studi inerenti all'elaborazione di una religione civile nell'Italia postunitaria[2], hanno indagato i modi attraverso i quali la religione della patria entrò nelle scuole e come queste concorsero alla

1 G.C. Abba, *Storia dei Mille narrata ai giovinetti*, Firenze, Bemporad, 1904 (I ed.).

2 In merito, ci si limita qui a richiamare: B. Tobia, *Una patria per gli italiani. Spazi, itinerari, monumenti nell'Italia unita (1870-1900)*, Roma-Bari, Laterza, 1991; U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Torino, Comitato di Torino dell'Istituto per la storia del Risorgimento italiano, 1992; I. Porciani, *Stato e nazione: l'immagine debole dell'Italia*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea* I: *La nascita dello Stato nazionale*, Bologna, il Mulino, 1993, pp. 385-428; G. Verucci, *L'Italia laica prima e dopo l'Unità 1848-1876*, Roma-Bari, Laterza, 1996; E. Gentile, *La Grande Italia. Il mito della nazione nel XX secolo*, Roma-Bari, Laterza, 2006; A.M. Banti, P. Ginsborg (edd.), *Il Risorgimento*, in *Storia d'Italia. Annali*, Torino, Einaudi, 2007, Vol. 22; A.M. Banti, *Sublime madre nostra. La nazione italiana dal Risorgimento al fascismo*, Roma-Bari, Laterza, 2011.

formazione dell'identità nazionale[3], come, ad esempio, tramite l'insegnamento della storia[4].

Numerose poi sono le pubblicazioni relative all'immagine del Generale dei Mille e al ruolo assunto dalla mitografia garibaldina nell'Italia postunitaria[5]. Sono tuttavia mancate sin qui peculiari analisi sulla funzione assunta dalla scuola nella diffusione dell'immagine dell'Eroe dei due mondi ai fini della formazione dell'identità nazionale delle giovani generazioni. Il presente saggio intende colmare, sia pure in parte, questa lacuna, indagando il modo in cui la scuola primaria, in particolare quella milanese, fu coinvolta nella rievocazione della figura di Garibaldi in occasione della celebrazione del primo anniversario della sua nascita.

Se le carte reperite negli archivi milanesi ci riconsegnano i propositi dell'amministrazione ambrosiana nonché – dato particolarmente interessante per la storia dell'educazione – le voci dei ragazzi, al fine di potere avere una visione più chiara del lavoro compiuto dalla scuola, si è ritenuto opportuno tentare anche di delineare l'azione svolta dagli insegnanti in classe con attenzione al tipo di messaggio culturale offerto in riferimento alla figura di Garibaldi. Per questa ragione la ricerca si è estesa alla consultazione delle riviste didattiche edite a Milano e a tiratura nazionale e che verosimilmente circolavano fra i maestri della città[6]. È noto che, in questa fase della storia della nostra scuola,

[3] Per il ruolo della scuola nella costruzione dell'identità nazionale si vedano: F. Traniello, *Nazione e storia nelle proposte educative degli ambienti laici di fine Ottocento*, in L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 61-91; P.L. Ballini, G. Pécout (edd.), *Scuola e nazione in Italia e in Francia nell'Ottocento. Modelli, pratiche, eredità. Nuovi percorsi di ricerca comparata*, Venezia, Istituto Veneto di Scienze, Lettere ed Arti, 2007; G. Chiosso, *Libri di scuola e mercato editoriale. Dal primo Ottocento alla Riforma Gentile*, Milano, FrancoAngeli, 2013, in specie il terzo capitolo dal titolo *La formazione del piccolo italiano nei libri di lettura*, pp. 83-108.

[4] A tale proposito, oltre al saggio di Traniello citato nella nota precedente, si rinvia a G. Ricuperati, *L'insegnamento della storia dall'età della Sinistra ad oggi*, «Società e Storia», n. 6, 1979, pp. 763-792; S. Soldani, *Il Risorgimento a scuola: incertezze dello Stato e lenta formazione di un pubblico di lettori*, in E. Dirani (ed.), *Alfredo Oriani e la cultura del suo tempo*, Ravenna, Longo, 1985, pp. 133-172; A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milano, Vita e Pensiero, 2004. All'interno di questo percorso, le ricerche di A. Ascenzi si sono soffermate sul modo in cui l'immagine di Giuseppe Mazzini fu presentata nei manuali di storia, a partire dall'Unità, e su come venne costruito il culto di questo padre della patria: 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 (in specie pp. 39-63).

[5] All'interno dell'ampia produzione relativa alla figura e al mito di Garibaldi si vedano almeno: L. Riall, *Garibaldi. L'invenzione di un eroe*, Roma-Bari, Laterza, 2007; M. Isnenghi, *Garibaldi fu ferito. Storia e mito di un rivoluzionario disciplinato*, Roma, Donzelli, 2007; M. Isnenghi, *Garibaldi*, in Id. (ed.), *I luoghi della memoria. Personaggi e date dell'Italia unita*, Roma-Bari, Laterza, 2010, pp. 25-46; A. Possieri, *Garibaldi*, Bologna, il Mulino, 2010, in specie pp. 15-46 dedicate alle modalità e alle tappe della creazione e diffusione del mito di Garibaldi.

[6] Le riviste consultate sono: «Il Corriere delle Maestre»; «La Difesa»; «Pensiero e Azione»; «La Scuola»; «La Scuola Popolare»; «La Tribuna Scolastica»; «Vita Magistrale Milanese»; «Vita

i periodici scolastici fungevano da guida e da strumento di aggiornamento del lavoro dei maestri[7]. Le riviste, prese in esame per gli anni a cavallo del centenario, si sono rivelate una fonte interessante anche per un'altra ragione: sulle pagine di questi periodici, infatti, apparivano le pubblicità di alcune biografie garibaldine destinate ai fanciulli e stampate dagli editori per tale ricorrenza.

1. *Biografie garibaldine*

Numerosissime sono le biografie di Giuseppe Garibaldi; il presente saggio si limita ad esaminarne solo alcune fra quelle rivolte ai fanciulli, pubblicate o riedite in occasione del primo anniversario della nascita dell'Eroe[8]. È da notare che la narrazione con stile aneddotico di vite esemplari, che si distinguevano per doti umane e civili, si inseriva in una tradizione antica, che dalla seconda metà dell'Ottocento aveva conosciuto nuova fortuna con la pubblicazione di «Plutarchi» di ispirazione self-helpista[9], ma anche di biografie riguardanti i padri della patria. Queste ultime rappresentavano inoltre la ripresa e la reinterpretazione in senso «laico e patriottico» del genere agiografico popolare, utilizzato per secoli dalla Chiesa con finalità educative, e che, in questa rinnovata veste, intendevano diffondere «una comune identità nazionale da plasmare e

Magistrale Femminile», edita dopo il 1907, ma di cui si è voluto ugualmente dare conto, per verificare se Garibaldi era stato ricordato per il centenario celebratosi qualche anno prima. Sono state inoltre analizzate «I Diritti della Scuola» che cominciò le sue pubblicazioni a Milano, per poi spostarsi a Roma; la rivista cattolica bresciana «Scuola Italiana Moderna» perché, anche se non più edita nel capoluogo lombardo dove era nata nel 1893, senz'altro era diffusa fra i maestri milanesi.

7 Si vedano in merito G. Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992; Id. (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993; Id. (ed.), *La stampa pedagogica e scolastica in Italia 1820-1943*, Brescia, La Scuola, 1997. Sul ruolo svolto dalle riviste didattiche nell'aggiornamento professionale dei docenti elementari si rinvia altresì a E. De Fort, *I maestri elementari italiani dai primi del Novecento alla caduta del fascismo*, «Nuova rivista storica», nn. V-VI, 1984, pp. 527-576; Ead., *La cultura dei maestri*, in *Cultura e società negli anni del fascismo*, Milano, Cordani Editore, 1987, pp. 221-260; C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005, pp. 325 ss.

8 Per l'amplissima bibliografia relativa a Garibaldi si rinvia a: A.P. Campanella, *Giuseppe Garibaldi e la tradizione garibaldina. Una bibliografia dal 1807 al 1970*, 2 voll., Ginevra, Comitato dell'Istituto internazionale di studi garibaldini, 1971; S. Magliani, *Garibaldi e la tradizione garibaldina. Bibliografia 1969-2002*, «Studi garibaldini. I quaderni», vol. III, n. 3-4, ottobre 2003. Per un'analisi delle biografie garibaldine dal punto di vista delle finalità educative perseguite si veda R. Certini, *Il mito di Garibaldi. La formazione dell'immaginario popolare nell'Italia unita*, Milano, Unicopli, 2000, che prende in esame cinque delle più note vite di Garibaldi edite nell'Ottocento.

9 Cfr. S. Lanaro, *Il Plutarco italiano: l'istruzione del «popolo» dopo l'Unità*, in *Storia d'Italia*, *Annali*, Vol. IV: *Intellettuali e potere*, a cura di C. Vivanti, Torino, Einaudi, 1981, pp. 553-587.

da rinsaldare attraverso la sacralizzazione di modelli civili e la trasposizione sul piano politico del linguaggio e degli apparati simbolici caratteristici della religione cattolica»[10].

Nello specifico l'indagine ha preso in esame sette libri individuati tramite due modalità: le pubblicità comparse sulla stampa periodica per maestri di cui si è detto intorno alla ricorrenza del primo centenario della nascita di Garibaldi[11] e il catalogo del Servizio Bibliotecario Nazionale[12], che ha permesso di constatare l'esistenza di ulteriori pubblicazioni biografiche di quello stesso periodo sul nizzardo destinate ai fanciulli, in alcuni casi scritte da insegnanti[13]. Nel campione è compresa anche la *Storia dei Mille narrata ai giovinetti* di Abba[14], di cui si dà conto per due motivi: anzitutto perché il libro, pubblicato per la prima volta nel 1904, venne riedito per l'occasione da Bemporad nel 1907 e fu distribuito, come già detto, dal Comune di Milano agli alunni delle primarie per ricordare il centenario; inoltre perché, nonostante la narrazione sia incentrata sull'impresa dei Mille, la figura di Garibaldi trova, nel volume, una sua collocazione specifica. I testi sono stati analizzati da un punto di vista pedagogico: si è voluto comprendere, oltre alle caratteristiche narrative di ciascuna opera, l'immagine specifica di Garibaldi trasmessa ai lettori.

La *Storia dei Mille narrata ai giovinetti* di Abba[15] era pubblicizzata da «I Diritti della Scuola»[16] e da «Vita Magistrale Femminile»[17], organo dell'Associazione magistrale femminile di Milano. Il lettore non si trova di fronte ad una vera e propria biografia. Non vi era cenno né alla nascita né alla formazione giovanile dell'Eroe, così come non venivano narrate le sue campagne in America latina. Era intenzione dell'autore raccontare i fatti accaduti a cavallo tra la pace di

[10] Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, cit., p. 93.

[11] Esse sono: G. Baldi, *Garibaldi narrato alla gioventù italiana*, Milano, Trevisini, 1907; G. Formento, *Fatti e detti memorabili della vita di Giuseppe Garibaldi. Libro di lettura popolare*, Milano, Antonio Vallardi, 1907; C. Petrali Castaldi, *Garibaldi. Biografia e aneddoti pei fanciulli d'Italia*, Milano, Antonio Vallardi, 1906.

[12] https://opac.sbn.it. (ultimo accesso: 31.01.2019).

[13] Si tratta di: O. Brentari, *La vita di Garibaldi narrata ai fanciulli*, Milano, Giacomo Agnelli, 1907; E. Checchi, *Garibaldi. La sua vita narrata ai giovani*, Milano, F.lli Treves, 1910 (I ed. 1907); G. Gobbi, *Giuseppe Garibaldi. Vita aneddotica narrata ai giovanetti (1807-1882)*, Parma, Luigi Battei, 1907.

[14] G.C. Abba, *Storia dei Mille narrata ai giovinetti*, Firenze, R. Bemporad & Figlio, 1907 (III ed.).

[15] Giuseppe Cesare Abba (1838-1910) nacque a Cairo Montenotte (Savona) e, come è noto, nel 1860, si unì ai volontari di Giuseppe Garibaldi per la spedizione nel Regno delle Due Sicilie. Appassionato di studi letterari, coniugò l'impegno sociale e civile alla scrittura di poesie e opere narrative. Su di lui si veda la voce biografica curata da D. Montino in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Editrice Bibliografica, 2013, Vol. I, p. 3; e quella edita in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, Vol. I, 1960, pp. 10-13.

[16] Sulla rivista, che aveva avviato le pubblicazioni nel 1899, cfr. la scheda curata da G. Tognon in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 234-239.

[17] Si veda la scheda redatta da R. Sani in *ibid.*, pp. 725-726.

Villafranca e la spedizione dei Mille. Il suo obiettivo era quello di scrivere una storia più dei garibaldini che del singolo personaggio Garibaldi, come si può evincere anche dal titolo dell'opera.

Questo dato è documentato altresì dal fatto che erano numerosi, tra le pagine, i ritratti di uomini che formavano il piccolo esercito pronto a scendere in Sicilia. Di loro Abba forniva notizie biografiche e erano sottolineate le virtù patriottiche[18]. Egli voleva enfatizzare il significato fondamentale dell'impresa: la partecipazione dei molti alla spedizione, sottraendola così alle carismatiche figure dei capi, per consegnarla ai giovani lettori come il risultato di uno sforzo comune. Nelle pagine del libro di Abba, come già anticipato, è possibile scorgere, seppur solo accennati, tratti della figura di Garibaldi. Per quanto riguarda la sua personalità, il Generale era raffigurato dall'autore come un uomo umile, dotato di forte empatia umana e di grande carisma: «Ma Garibaldi – osservava Abba – che sapeva ricevere come un re, nello stesso tempo sapeva parere quasi inferiore a chi gli si presentava, onde quel fàscino e quel suo dominio sui cuori, da cui subito quei siciliani si sentirono presi»[19]. Esaltato dalla folla nel grosso borgo di Salemi, Garibaldi – raccontava Abba – era investito di quell'aura sacrale che poi sarebbe durata nel tempo:

> Tutta la gente aspettava gridando: 'Garibaldi! Garibaldi!' […]. E le campane squillavano a festa; e una banda suonava delle arie eroiche. […] Ma quando lo videro, quei siciliani quasi quasi si inginocchiarono. Oh che viso, che testa, che santo! […]. Cominciava così a formarsi intorno a lui la leggenda che pigliò poi tante forme[20].

Anche a Palermo, dopo l'armistizio, egli raccontava di come Garibaldi fosse stato onorato dai cittadini che, durante il suo passaggio a cavallo per le strade della città, «chinavano religiosamente la fronte, o gli si protendevano come ad un essere sovrumano»[21].

«Il Corriere delle Maestre»[22], pubblicato a Milano, ma diffuso in tutta la nazione, e «Vita Magistrale Milanese»[23], voce dell'Associazione magistrale milanese, sezione dell'Unione Magistrale Nazionale, pubblicizzavano invece, in occasione del centenario, l'opera della maestra Cesira Petrali Castaldi[24]

[18] I ritratti che Abba offre nel suo libro sono molteplici. Si citano ad esempio quelli di: István Türr, Lajos Tüköry, Giuseppe Bandi, Giuseppe Sirtori, Nino Bixio, Vincenzo Orsini, Giuseppe La Masa, Giacinto Carini, Benedetto Cairoli, Angelo Bassini, Vittore Tasca, Luigi Dall'Ovo, Daniele Piccinini, Antonio Mosto, Bartolomeo Savi, Giuseppe Missori, Francesco Nullo, Giovanni Acerbi e Ippolito Nievo: Abba, *Storia dei Mille narrata ai giovinetti*, cit., pp. 46-80.

[19] *Ibid*., p. 105.

[20] *Ibid*., p. 106.

[21] *Ibid*., p. 207.

[22] Sull'autorevole rivista magistrale, pubblicata dal 1897 al 1941, cfr. Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 206-209.

[23] Sul periodico, edito dal 1903 al 1925, si veda la scheda redatta da R. Sani in *ibid*., pp. 727-728.

[24] Cesira Petrali Castaldi (1875-1955) nacque e morì a Milano, dove conseguì la patente di maestra elementare e insegnò. Svolse anche un intenso lavoro di giornalista e di scrittrice

dal titolo *Garibaldi. Biografia e aneddoti pei fanciulli d'Italia*[25]. In apertura il volume presenta una dedica ai ragazzi in cui la maestra dichiarava le finalità educative del suo scritto: far diventare i giovani consapevoli delle mirabili virtù che avevano reso Garibaldi così tanto amato e venerato nel tempo. Ella scriveva:

> Questi appunti furono scritti pensando a voi, fanciulli. Siatemene grati leggendoli attentamente e conservandoli per rivederli nell'età matura, allorché potrete meglio comprendere il grande cuore di Giuseppe Garibaldi [26].

L'opera era suddivisa in due parti. La prima era dedicata in modo specifico alle vicende che avevano caratterizzato la vita del nizzardo, mentre la seconda, dal titolo *Gli aneddoti*, annoverava le virtù da lui possedute. Si cominciava dunque dalla narrazione della fanciullezza: l'immagine che si voleva trasmettere era quella di un Garibaldi che, fin dalla più tenera età, si era fatto maestro a se stesso. L'infanzia e l'adolescenza erano raccontate attraverso la citazione di un passo delle sue memorie autobiografiche, dove egli scriveva di aver imparato la ginnastica, la scherma e l'equitazione da sé e di essere nato sapendo già nuotare[27]. Non vi era alcun cenno alla sua formazione scolastica. In compenso la Petrali si soffermava sulla sua passione marinara[28]. Il racconto proseguiva passando in rassegna le campagne in America latina, il ritorno in patria coi suoi legionari e le imprese in Italia e in Francia, il ritiro a vita privata a Caprera e la sua morte.

Nella seconda parte del libro venivano presentate le virtù del Generale e si può notare l'analogia tra il testo della maestra milanese e la descrizione data da De Amicis in *Cuore*. Come è noto, l'opera deamicisiana offre un ritratto di Garibaldi che ha contribuito fortemente all'affermazione del suo mito. Il padre di Enrico, «in una sorta di preghiera laica», ne ripercorre i tratti al momento della scomparsa in quell'anno di scuola narrato da De Amicis (il 1882)[29]. Il medaglione a lui dedicato elenca, in un rapido crescendo, le doti di

collaborando prevalentemente con la casa editrice Vallardi, presso la quale pubblicò la biografia garibaldina di cui si sta parlando; su di lei si veda la scheda curata da D. Pellegrini in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. II, pp. 326-327.

[25] Cfr. «Il Corriere delle Maestre» (d'ora in avanti cit.: CdM), vol. X, n. 38, 30 giugno 1907, p. 431; «Vita Magistrale Milanese» (d'ora in avanti cit.: VMM), vol. XIV, n. 5, maggio 1907, p. 57; n. 6, giugno-luglio 1907, p. 74: dove si legge che il libro era «la più efficace e duratura delle commemorazioni dell'Eroe popolare. Scritto in forma chiara e piacevole da una educatrice [sarebbe stato] letto con vivo interesse e con profitto dai fanciulli». Si noti che la Vallardi era la casa editrice che pubblicava sia le riviste che facevano pubblicità all'opera della Petrali sia l'opera stessa.

[26] Petrali Castaldi, *Garibaldi. Biografia e aneddoti pei fanciulli d'Italia*, cit., p. 1.

[27] *Ibid*., p. 3.

[28] È stato rilevato in proposito che, benché lo spirito marinaro abbia influito notevolmente nella formazione della sua personalità, questo aspetto non è stato tenuto in adeguata considerazione nell'elaborazione della memoria di Garibaldi. Anche nell'amplissima iconografia dell'eroe, l'immagine del condottiero a cavallo e del generale prevale su quella dell'uomo di mare: Possieri, *Garibaldi*, cit., pp. 63-64.

[29] *Ibid*., p. 41; per la raffigurazione di Garibaldi in *Cuore* si rinvia altresì a Traniello, *Nazione*

quest'uomo che fin da piccolo dimostra di possedere forza e coraggio inusuali per un ragazzo. La rappresentazione che ne risulta è quella di un esempio di virtù guerriere, morali e civili, di un eroe imbattibile da più punti di vista (una specie di supereroe) e, nel contempo, di un uomo semplice, ma privo di difetti, di un santo, di un redentore di popoli, la cui memoria era destinata a durare nel tempo dentro e fuori le aule scolastiche. L'immagine che tale profilo tendeva ad accreditare era duplice: da un lato si insisteva su Garibaldi come «Eroe del popolo»; dall'altro l'enfasi era posta sulle sue virtù umane e civili, sul suo carisma personale, sulle sue straordinarie qualità di condottiero e sul profondo amore verso la patria[30].

Allo stesso modo la Petrali avviava la narrazione parlando della bontà e del coraggio, due doti principali che il nizzardo sapeva esercitare in guerra e in tempo di pace, e ricordava alcuni episodi di eroicità da lui compiuti fin dalla fanciullezza (il salvataggio di una lavandaia a otto anni mentre rischiava di annegare in un canale e dei suoi compagni in barca a tredici anni). Altra virtù del generale era la costanza:

> Per lui, – ella scriveva – la parola *impossibile* era vuota di senso. Tentare, provare sempre, non però a casaccio, o se non vi fosse almeno una piccola probabilità di riuscita e perseverare. La più difficile delle vittorie appartiene sempre ai più costanti. Questo il segreto de' suoi successi[31].

Il nizzardo aveva dato prova di essere non solo valoroso, ma anche modesto: ella ricordava come, ad esempio, più di una volta avesse rifiutato molti doni che gli erano stati offerti. Inoltre egli aveva saputo tanto ubbidire quanto comandare e questa era un'altra delle sue virtù rievocata dalla maestra milanese. In più occasioni aveva mostrato di essere generoso, clemente e prodigo: «appena aveva qualcosa, ne faceva parte ai miseri», scriveva l'autrice[32]. Per quanto riguardava gli affetti, Garibaldi aveva tanto amato il padre ed aveva avuto un vero culto per la madre e per gli amici. Era stato riamato da tutti e, ovunque passasse, la gente si radunava per vederlo e sentirlo parlare. La patria, però, era rimasta il suo amore più grande. L'ultima virtù richiamata dalla Petrali era la semplicità: Garibaldi era stato moderato nel cibo e sobrio nel bere; attento alla pulizia della sua persona e degli abiti.

Significativa era la presenza di alcuni *topoi* ben precisi nella costruzione e nell'uso della mitologia risorgimentale sulla figura di Garibaldi: egli era appellato come «grande discepolo» di Mazzini, «generosa anima», «novello

e storia nelle proposte educative degli ambienti laici di fine Ottocento, cit., pp. 61-67; L. Scaraffia B. Tobia, *«Cuore» di De Amicis (1886) e la costruzione dell'identità nazionale*, «Dimensioni e problemi della ricerca storica», vol. 2, 1988, pp. 103-130.

30 Cfr. E. De Amicis, *Cuore*, Milano, Garzanti, 1963, pp. 249-250 (I ed. 1886).

31 Petrali Castaldi, *Garibaldi. Biografia e aneddoti pei fanciulli d'Italia*, cit., p. 14.

32 *Ibid*., p. 18.

Cincinnato» ed «Eroe dei due mondi»[33]. L'autrice concludeva il suo libro riecheggiando il padre di Enrico di *Cuore* e scriveva: «Fanciulli, quando udite parlar di Garibaldi, mandate un saluto riverente alla sua memoria e alla sua umile tomba a Caprera, monumento e simbolo nazionale»[34].

Sempre su «Vita Magistrale Milanese»[35] e su «Il Corriere delle Maestre»[36], per la ricorrenza del primo centenario della nascita di Giuseppe Garibaldi, si trova la pubblicità di un altro libro edito da Vallardi a Milano nel 1907, ovvero *Fatti e detti memorabili della vita di Giuseppe Garibaldi. Libro di lettura popolare*, scritto dall'insegnante Giovanni Formento[37]. Nel proemio l'autore affermava che la sua opera era rivolta ai fanciulli delle scuole elementari, ai figli del popolo che interrompevano gli studi al terzo anno e agli operai desiderosi di cultura[38]. Egli dunque intendeva parlare a un pubblico non colto. Non a caso, come già gli altri libri illustrati, anche questo prendeva le mosse dalla giovinezza del nizzardo, descrivendolo come un ragazzo sano, robusto e intelligente, un cavaliere esperto e un nuotatore insuperabile, sicuro sulla terra come sull'acqua, un agricoltore appassionato, un soldato e un marinaio intrepido. Seguiva il racconto delle campagne nell'America del sud, dove Garibaldi era vissuto sempre come l'ultimo dei suoi soldati rifiutando offerte di danaro, di terre e di titoli. La seconda parte della biografia era dedicata alle imprese compiute in Italia: nello specifico, Formento si soffermava sull'esperienza della Repubblica romana che, seppur fallita, si era rivelata un momento particolarmente importante per l'affermazione del mito di Garibaldi[39].

Significativa risulta essere la tendenza, da parte dell'autore, alla sacralizzazione dell'epopea risorgimentale, che si nota dall'uso frequente dell'aggettivo *santo*:

> il segreto di quei successi straordinari – si legge ad esempio – stava nel genio militare innato dell'Eroe, nella prontezza della concezione dei piani di battaglia e della loro esecuzione, nella fiducia incrollabile nella vittoria; perché combatteva per la causa santa della giustizia e della umanità, e nell'ascendente morale, che esercitava sui soldati[40].

E ancora: «L'Italia, che corse con Lui [Garibaldi], entusiasmata, alle sante battaglie del suo riscatto, risorta a dignità di nazione, innalza al suo nome un

[33] *Ibid*., p. 5, p. 7, p. 10 e p. 12.
[34] *Ibid*., p. 32.
[35] Cfr. VMM, a. XIV, n. 5, maggio 1907, p. 57; n. 6, vol. XIV, giugno-luglio 1907, p. 74.
[36] Cfr. CdM, vol. X, n. 37, 23 giugno 1907, p. 272.
[37] Da notare, anche in questo caso, che i periodici che facevano pubblicità al lavoro di Formento e l'opera stessa erano editi da Vallardi.
[38] Formento, *Fatti e detti memorabili della vita di Giuseppe Garibaldi*, cit., p. 3.
[39] Il libro di Formento pone l'enfasi su una delle caratteristiche del mito di Garibaldi. Da un punto di vista militare, infatti, la modalità con cui Garibaldi aveva tentato la presa di Roma aveva reso celebre in Italia il suo modo di combattere, incentrato sul coraggio del condottiero, sull'emulazione dei suoi uomini, sull'elemento umano e sull'assalto ardito ed impetuoso: Possieri, *Garibaldi*, cit., p. 127.
[40] Formento, *Fatti e detti memorabili della vita di Giuseppe Garibaldi*, cit., p. 54.

inno d'ammirazione e di riconoscenza, che sale fino al cielo e si diffonde per tutta la terra»[41].

Formento non lo descriveva fisicamente (a questo provvedevano le illustrazioni che lo raffiguravano nelle varie fasi della sua vita), ma da un punto di vista morale coerentemente con le finalità educative dell'opera. Garibaldi era pronto, con tutta la forza onnipotente della sua bontà, a combattere o morire per la libertà e la giustizia. Ammirato per la squisita bontà d'animo – riferiva Formento – aveva sacrificato l'interesse, la gloria, l'amor proprio e la vita alla patria e all'umanità, senza superbia né spavalderia, non combattendo per acquistare gradi o ricchezze, di cui si era mostrato sempre noncurante. Egli era presentato come l'ideale di uomo virtuoso, di patriota appassionato, di spirito umanitario. L'esaltazione delle sue doti non impediva però all'autore di fare menzione del modo in cui egli era definito dai nemici, come ad esempio «miserabile filibustiere»[42].

Anche in questo caso, emerge, fin dalle prime pagine, la tendenza a sacralizzare l'epopea risorgimentale e a dipingere Garibaldi come un essere superiore. In sintonia con il modello dell'immagine di Garibaldi che nel tempo si era accreditata, Formento lo eguagliava a Gesù Cristo[43]:

> Giuseppe Garibaldi, – così egli scriveva – esempio inarrivabile di virtù civili, che si è trascinato dietro con forza irresistibile le turbe del vecchio e del nuovo mondo, assetato di libertà; come Gesù si trascinava dietro sui campi di Galilea la folla, assetata d'amor divino[44].

Come il Messia, egli notava, aveva subito sofferenze, ingiustizie e il tradimento.

Sul periodico milanese «La Scuola»[45] era invece presentato con ricchezza di riferimenti il volume dell'insegnante toscano Giovanni Baldi dal titolo *Garibaldi*

41 *Ibid*., pp. 59-60.

42 *Ibid*. p. 31.

43 Banti ha rilevato che il «nesso diretto tra l'epopea del nazionalismo risorgimentale e la cristologia» rappresenta «una soluzione mitografica» che negli anni non ha più abbandonato la figura di Garibaldi che è investito di «un'aura di santità». Egli, come i santi del culto cristiano, si è distinto per una vita segnata dalla sofferenza e dalla disponibilità al sacrificio; tale caratteristica coniugata «alla sua moralità, alla sua bellezza e alle sue qualità di condottiero» lo ha elevato al di sopra degli uomini del suo tempo. Egli nota altresì che la santità di Garibaldi si distingue dalla tradizionale santità cristiana per due motivi: sia perché è assente la dimensione metafisica (il «santo nazionale» non funge da mediatore tra il presente e l'aldilà), sia perché le rappresentazioni grafiche o scultoree degli eroi patriottici sono realizzate per entrare a far parte del mondo dei vivi (dunque sono collocate ad esempio nelle piazze cittadine), mentre nella tradizione cristiana le figure dei santi (statue, ma anche reliquie) sono collocate in luoghi riservati al culto religioso, da cui escono solo in particolari momenti: Banti, *Sublime madre nostrvol. La nazione italiana dal Risorgimento al fascismo*, cit., pp. 34-37.

44 Formento, *Fatti e detti memorabili della vita di Giuseppe Garibaldi*, cit., p. 59.

45 Questo giornale scolastico esce a Milano dal 1902 al 1941; inizialmente collocato su posizioni di neutralità politica, si avvicinò in seguito agli ambienti democratici e socialisti: in merito si veda la scheda curata da R. Sani in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia*

narrato alla gioventù italiana, edito a Milano nel 1907, in occasione proprio del centenario, da Trevisini, ovvero la casa editrice che pubblicava anche il periodico[46]. «Nella ricorrenza del I centenario della nascita di Garibaldi – così si legge nella rivista – non sono state poche le pubblicazioni che hanno parlato dell'Eroe dei due Mondi. Ma quante hanno raggiunto lo scopo di farsi comprendere dalle giovani menti?». Poiché, continuava il periodico, i libri dei grandi non sempre capitavano nelle mani dei piccoli, né questi si sentivano troppo allettati a leggerli e i libri scolastici, a loro volta, dicevano ben poco su di lui, l'autore aveva deciso di compiere un'opera «buona e giovevole». Così commentava il periodico: «Non ci dovrebbe essere – a nostro parere – giovinetto italiano che non [conosca] la vita del Garibaldi, e non [sia] in grado di comprenderne tutta la grandezza, e quanto doverosa sia la venerazione alla memoria di Lui». Si consigliava allora ai maestri l'acquisto del libro di Baldi, indirizzato alla mente e al cuore dei ragazzi d'Italia: «Nulla si è trascurato perché l'opera riuscisse degna di entrare nelle famiglie e nelle scuole, ed il libro per l'eleganza dell'edizione, per la bontà del testo, per la modicità del prezzo si raccomanda da sé, né ha bisogno di soverchie parole che lo illustrino»[47].

Nella premessa dell'opera, Baldi precisava il suo pubblico di lettori: egli affermava di rivolgersi agli adolescenti, ai quali voleva parlare di Garibaldi in modo semplice, come se ci si stesse accostando ai più piccoli scolari. L'utilizzo di un linguaggio facilmente comprensibile avrebbe permesso anche agli adulti scarsamente alfabetizzati di familiarizzare con la figura dell'eroe. Anche in questo caso, l'autore prendeva le mosse dall'infanzia del nizzardo, evidenziando che fin da bambino aveva amato il mare e si era mostrato coraggioso. La sua anima, già durante la fanciullezza, si era rivelata di angelica bontà per la compassione verso i miseri e lo spirito di disinteresse e di sacrificio. Fin dalle prime pagine, egli parlava del nizzardo come di un guerriero dalla grandezza speciale. Così scriveva l'autore:

> La grandezza di Garibaldi non è quella soltanto del guerriero onusto di gloria, non è quella soltanto di chi è pronto a far scintillare la spada al sole ed a far getto della vita per ogni causa che sia bella, nobile, giusta, generosa […] ma è la grandezza che viene dal cuore, da un cuore che ha palpiti di amore infinito e fremiti di dolore per tutta l'umanità che spera e soffre, da un cuore riboccante di sentimento, pronto ognora a' sacrifici più dolorosi, che non vede, non sente che per gli altri, mai per sé[48].

Ritorna in questa biografia il paragone fra la figura di Garibaldi e Gesù Cristo. Il Nazzareno si era sacrificato per l'umanità disconoscente, aveva sofferto ed era morto perdonando; similmente Baldi riteneva si fosse comportato Garibaldi, verso il quale gli amici e gli avversari avevano chinato la fronte con reverenza.

(1820-1943), cit., pp. 590-591.

46 Cfr. «La Scuola» (d'ora in avanti cit.: Sc), vol. X, n. 36, 1 luglio 1907, p. 272.

47 *Ibid*.

48 Baldi, *Garibaldi narrato alla gioventù italiana*, cit., p. 6.

Questa era la ragione per cui nel momento della sua morte, Baldi lo ricordava con l'espressione «l'antico Iddio»[49]. Il proposito educativo di questa biografia si manifestava largamente nella trama ricca di passi che enfatizzavano gli atti di eroismo, di dedizione disinteressata e di amor patrio volti a sollecitare emulazione nei giovani. Il volume concorreva alla diffusione del mito di Garibaldi, avendo ben chiara la funzione formativa ad esso assegnata: «Parlando di Garibaldi – scriveva Baldi – si suscita sempre un palpito di amore, un palpito che rende più buoni, più generosi, che ci fa migliori; parlare di lui è dunque educare, è compiere una buona azione»[50].

Oltre alle opere pubblicizzate dalle riviste magistrali, in occasione del primo centenario della nascita di Garibaldi furono pubblicati altri libri destinati agli alunni delle scuole primarie, come già si è spiegato in precedenza. Uno di questi era *Giuseppe Garibaldi. Vita aneddotica narrata ai giovanetti (1807-1882)*, scritto da Guelfo Gobbi, professore e ufficiale dell'esercito, ed edito a Parma nel 1907 da Luigi Battei. L'opera era suddivisa in tre parti: la prima era dedicata alla giovinezza di Garibaldi, la seconda narrava delle imprese in America tra il 1837 e il 1848 e l'ultima era rivolta alle campagne in Italia tra il 1848 e il 1870. Garibaldi era descritto dall'autore come un bel fanciullo biondo, dagli occhi celesti ed espressivi, agile e forte, cresciuto a contatto con la natura; un ragazzo buono, sensibile e coraggioso. Il suo cuore lo aveva spinto sempre a prendere le parti dei più deboli e degli oppressi, per gli uomini come per gli animali, fino a mettere in pericolo la sua vita per loro. Gobbi si soffermava sull'appellativo di «corsaro» lui attribuito: il termine – veniva precisato – non doveva essere frainteso con quello di «pirata» (che assalta e rapina, vive di strage e di furto); le azioni intraprese dal «corsaro» avvenivano invece nella legalità e erano poste al servizio di uno Stato. Egli era descritto come un uomo forte e generoso; di grande dignità anche nella povertà, che aveva rifiutato non solo gli onori meritati, ma persino quel tanto di ricompensa materiale che lo poteva sollevare dalla miseria. Del Generale erano ricordati altresì il senso di disciplina, di subordinazione e di obbedienza.

Nella parte finale della sua opera, Gobbi metteva in luce l'eredità che Garibaldi aveva lasciato ai ragazzi: la sua vita avrebbe dovuto essere un esempio e un insegnamento per tutta la gioventù italiana.

Proprio perché il libro era indirizzato ai fanciulli, all'autore premeva ricordare che Garibaldi non era fuggito dai banchi di scuola – come affermavano le sue biografie – per rincorrere una vita oziosa e viziosa, bensì per affrontare un'altra scuola ben più dura, ossia quella «della lotta contro gli elementi e contro le esigenze del vivere»[51]. Come egli precisava, il volume non voleva aggiungere qualcosa di nuovo a quanto la storia aveva già detto di lui. Si voleva piuttosto

[49] *Ibid*., pp. 87-88.
[50] *Ibid*., p. 3.
[51] Gobbi, *Giuseppe Garibaldi. Vita aneddotica narrata ai giovanetti (1807-1882)*, cit., p. 103.

che la sua figura divenisse un modello per formare i giovani, fosse un esempio di forza, di abnegazione, di onestà e di amore. Per le sue caratteristiche, egli era degno di essere assunto come primo educatore della gioventù italiana[52].

Altra biografia presa in esame in questa sede è intitolata *La vita di Garibaldi narrata ai fanciulli*.

L'opera, compilata da Ottone Brentari[53], anch'egli insegnante nonché scrittore, fu data alle stampe nel 1907 a Milano dalla tipografia Giacomo Agnelli. La narrazione prendeva avvio con un riferimento all'Italia di inizio Novecento, ormai libera, unita e indipendente grazie all'opera di uomini che avevano pensato, lottato e sofferto per amore della patria. Brentari affermava che tra i grandi protagonisti del Risorgimento: «Uno dei più gloriosi […] [era stato] il Generale Giuseppe Garibaldi, che [era] nato or son cent'anni»[54]. Al fine di informare i fanciulli sulla vita di questo illustre padre della patria egli aveva deciso di scrivere un opuscolo su di lui. Brentari ricordava gli atti di bontà, di generosità e di coraggio che avevano caratterizzato la personalità dell'Eroe dei due mondi dalla più tenera età. Rievocava il periodo americano e le glorie di cui Garibaldi si era ricoperto combattendo per l'indipendenza della provincia di Rio Grande e segnalava il ruolo svolto nel processo di liberazione ed unificazione della penisola italiana. Il racconto si concludeva con la morte del Generale. Anche in questa opera emergeva chiaramente la volontà dell'autore di illustrare le qualità morali di Garibaldi e di non soffermarsi sul suo aspetto fisico, del quale non si fa menzione. Egli descriveva il Generale dei Mille come un uomo buono e generoso, che aveva consacrato tutta la vita alla difesa dei più deboli e degli oppressi.

L'ultima biografia analizzata è quella del giornalista e scrittore Eugenio Checchi[55]. Con il titolo *Garibaldi. La sua vita narrata ai giovani*, l'opera fu edita per la prima volta nel 1907 dalla casa editrice milanese Treves in occasione del I centenario della nascita di Garibaldi. L'edizione presa in esame è la ristampa del 1910. Offrendo agli italiani questo libro, l'autore – così dichiarava l'editore nella refazione – aveva voluto raccomandarlo alla gioventù delle scuole[56]. Anche Checchi narrava la «lunga sequela di atti memorabili e di primati morali» del

[52] *Ibid*., pp. 3-4.

[53] Ottone Brentari (1852-1921), insegnante, giornalista, scrittore, nacque a Strigno, una frazione del Comune di Castel Ivano in provincia di Trento. Fin da giovane dimostrò sentimenti patriottici e liberali che conservò e manifestò durante tutta la sua esistenza. Fu, tra l'altro, autore prolifico di opere su Garibaldi e, in specie, sui trentini che avevano preso parte alle sue imprese. Su di lui si veda la scheda biografica curata da M. Guargena in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. I, pp. 214-215; e quella pubblicata in *Dizionario Biografico degli Italiani*, cit., vol. 14 (1972), pp. 161-162.

[54] Brentari, *La vita di Garibaldi narrata ai fanciulli*, cit., p. 4.

[55] Su Eugenio Checchi (1838-1932) si veda la voce biografica curata da P. Petroni in *Dizionario Biografico degli Italiani*, cit., Vol. 24 (1980), pp. 399-403.

[56] Checchi, *Garibaldi. La sua vita narrata ai giovani*, cit., p. VIII.

giovane nizzardo proposta dalle altre biografie[57], come pure faceva luce sulle imprese di quell'uomo che, per tutta la vita, era accorso dove la libertà era stata minacciata.

Era intenzione dell'autore – di fatto poi destinata a non essere rispettata – raccontare il Garibaldi vero, tramandato dalle pagine della storia, non il Garibaldi plasmato dalla leggenda[58]; egli voleva stemperare l'aura fantastica che lo circondava, aderendo alla realtà. La figura di Garibaldi era, invero, illustrata secondo i canoni consueti: egli era la splendida personificazione della storia, l'uomo che aveva sfidato i tempi, il rappresentante di un ideale, di un principio, di una civiltà[59]. Di lui, Checchi ricordava che fin da ragazzo si era mostrato semplice e buono, servizievole e disciplinato; che aveva desiderato la fratellanza tra i popoli; che era stato mosso da un nobile sentimento di giustizia e invaso da un profondo sdegno per tutte le azioni disonorevoli; che aveva sognato di diventare cavaliere dell'umanità. Divenuto adulto, aveva voluto aiutare gli oppressi contro gli oppressori e mettersi a difesa dei deboli contro i forti, vegliando sempre su tutti e tutto. Di qui gli appellativi elogiativi usati, quali «generoso italiano», «vedetta sempre vigile», «animoso condottiero», «leone», «apostolo dell'umanità», «infaticabile eroe», «l'inviato da Dio»[60]. Egli scriveva:

> L'eroe immacolato di quelle imprese, che non hanno riscontro nella storia di nessun popolo, le riassume lui tutte in sé: egli ha nome Giuseppe Garibaldi: che vuol dire il vendicatore delle servitù secolari, il donatore di regni, il gigante iperbolico che accumula e raccoglie benedizioni, forza morale fattasi irresistibile, idea grande e generosa diventata persona[61].

Anche il Garibaldi narrato da Checchi non era più soltanto un uomo e, infatti, si legge:

> qual meraviglia dunque, se al suo passaggio gli eserciti deponevano le armi senza combattere, e se al tuonare di quella voce, all'apparire di quel mantello, allo sfolgorar di quelli occhi, dolci e terribili insieme, legioni di volontari sbucavano fuori, come venissero di sottoterra?[62]

Garibaldi diventava un'entità quasi divina e profetica, una specie di semidio che però non perdeva le virtù del cittadino e del soldato. Di lui Checchi riferiva che non era stato un politico, ma che si era battuto affinché i popoli fossero governati con onestà e giustizia. Aveva nutrito una scarsa fede negli uomini politici e nella diplomazia, convinto che fosse stata inventata per ingannare i popoli. Sincero predicatore di pace, aveva affermato la sua diffidenza per le

57 Possieri, *Garibaldi*, cit., p. 48.
58 Checchi, *Garibaldi. La sua vita narrata ai giovani*, cit., p. 124.
59 *Ibid*., pp. 1-4.
60 *Ibid*., p. 32, p. 58, p. 70, p. 88 e 269, p. 91 e p. 179.
61 *Ibid*., p. 134.
62 *Ibid*., p. 179.

religioni, ritenendole fondate sul pregiudizio, sulla superstizione e sulla cupidigia umana. Raccontando le meravigliose avventure di un'esistenza che pareva un romanzo, Checchi intendeva, al pari di altri biografi sin qui visti, suscitare nelle menti dei più piccoli ammirazione per questo padre della patria.

Volendo fare un bilancio delle pubblicazioni qui illustrate, si deve riconoscere che esse presentano molte analogie, ma anche divergenze. Innanzitutto le accomuna la periodizzazione adottata: essa seguiva l'ordine cronologico degli avvenimenti e ciascuna narrazione era in terza persona, talvolta arricchita da citazioni di discorsi diretti del protagonista e documenti dell'epoca. Un aspetto rilevante che connota tutti gli autori considerati è senza dubbio costituito dalla venerazione verso Garibaldi che li motiva a narrare le sue gesta non solo per esaltarle, ma soprattutto per perpetuarne la memoria. Le biografie volevano essere sì un riconoscimento della statura di questo padre della patria, ma innanzi tutto miravano a radicare nei lettori le virtù che egli rappresentava e che nel corso della sua vita, epica e leggendaria, aveva testimoniato. Esse cioè condividevano l'obiettivo di contribuire alla formazione e al consolidamento dell'identità nazionale, stimolando i giovani a emulare i tratti dell'Eroe. Di qui la tendenza a presentarlo, fin dalla tenera età, come incarnazione di alte virtù umane e civili. Egli era descritto con accezioni unicamente positive: di lui non si evidenziavano difetti, né si diceva degli errori commessi. Anche quando un fatto poteva essere interpretato come una violazione delle regole, se ne dava sempre una giustificazione plausibile come quando il giovane Garibaldi, insieme ai suoi compagni, aveva trovato uno stratagemma per fuggire di nascosto verso il mare, lontano dalla disciplina scolastica a lui insopportabile. Verosimilmente la sua azione doveva essere condannata, ma gli autori lo giustificavano in ragione della sua inguaribile vocazione di marinaio.

Per quanto riguarda le divergenze fra i volumi, si nota subito come non sempre i contenuti coincidessero. Nell'opera di Abba l'accento, come detto, era posto più sulla spedizione dei Mille che sulla vita del singolo personaggio Garibaldi. Mentre, infatti, gli altri autori seguivano la ricostruzione biografica tradizionale della vita dell'Eroe (nascita e formazione, prime esperienze giovanili in ambito politico, campagne in America latina, battaglie nel sud d'Italia, morte del Generale) e adottavano come genere di riferimento quello agiografico popolare, Abba iniziava il suo racconto dal 1859. È da notare inoltre che in tre volumi non comparivano le illustrazioni: i libri di Gobbi, Brentari e Checchi erano infatti sprovvisti di quell'apparato iconografico che avrebbe contribuito a rendere più piacevole e facile la lettura ai fanciulli. Un'altra differenza è prettamente stilistica: Baldi adottava un tono narrativo avventuroso, romanzesco; Petrali, Formento, Brentari e Gobbi utilizzavano un ritmo narrativo coinvolgente. Tutti questi autori usavano comunque un linguaggio semplice e diretto. Invece Abba e Checchi avevano un modo di scrivere diverso, ricco di lunghe descrizioni e precisazioni di nomi e di date in quanto ritenevano che la narrazione dei fatti dovesse risultare quanto più possibile autentica e veritiera.

Si può infine osservare che se si confronta il Garibaldi di *Cuore* con il Garibaldi raccontato a inizio Novecento nei libri consultati si nota una decisa continuità. Egli era ancora rappresentato come il santo laico, protettore della patria di cui si voleva eternare la memoria. Particolarmente insistita era la sacralizzazione della sua figura nelle opere di Abba, Formento, Baldi e Checchi.

2. *L'Eroe dei due mondi nelle riviste per la scuola*

Le riviste educative consultate, oltre a fare pubblicità di libri editi o ristampati su Garibaldi in occasione del centenario della nascita, ricordavano l'Eroe all'interno della sezione didattica, in specie con riferimento all'insegnamento scolastico della storia che, come già rilevato, ha giocato un ruolo importante in ordine alla formazione del sentimento nazionale nelle aule scolastiche[63].

Come è noto, alle origini dello Stato unitario italiano, lo spazio destinato alla storia nelle elementari era molto circoscritto. Nei programmi didattici varati con il Regolamento del 15 settembre 1860 da Terenzio Mamiani, ministro della Pubblica Istruzione del Regno sabaudo, essa si limitava a fornire ai fanciulli una prima idea della storia nazionale, la quale si identificava esclusivamente con la storia dei sovrani sabaudi. Tale disciplina era presente solo nella classe IV elementare (ossia nell'ultimo anno di scuola, peraltro non obbligatorio) e rientrava sotto la voce «Lettura». Da ciò si evince che, subito all'indomani della promulgazione della legge Casati, la storia non aveva una collocazione curricolare autonoma, ma era inserita in un unico raggruppamento disciplinare insieme alle nozioni basilari di fisica, scienze naturali e geografia, perché si riteneva che la scuola elementare dovesse dare al fanciullo soltanto i primi rudimenti del sapere. Alcuni studi hanno inoltre evidenziato come i docenti reclutati all'indomani dell'unificazione del Paese ignorassero completamente la storia civile e nazionale sia perché la gran parte di loro non aveva frequentato un regolare corso di studi magistrali, sia perché, a differenza della storia sacra, quella patria non risultava tra le materie insegnate nelle scuole elementari e normali della maggior parte degli Stati preunitari[64].

Con l'avvento della Sinistra al potere nel 1876, la classe dirigente liberale avvertì l'esigenza di dare maggiore spessore all'insegnamento della storia nella scuola elementare. I principali sforzi furono rivolti, prima di tutto, a fornire

63 Oltre alla bibliografia già indicata alla nota 5 sull'insegnamento della storia, per i programmi per la scuola primaria cui si fa riferimento nel testo si rinvia a F.V. Lombardi, *I programmi per la scuola elementare dal 1860 al 1985*, Brescia, La Scuola, 1987.

64 Si deve anche ricordare la forte presenza di ecclesiastici tra le file dei maestri, lontani dal nuovo corso politico postunitario e quindi poco attenti nei riguardi della storia civile e nazionale: si veda in merito Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, cit., pp. 23-32.

ai futuri maestri una più organica formazione in tale ambito con particolare riferimento alla storia italiana recente e poi a promuovere specifiche iniziative di aggiornamento per il corpo docente già in servizio[65]. Soltanto nel 1888, però, si procedette alla modifica dei contenuti di tale insegnamento nel quadro del riordinamento dei programmi didattici per la scuola elementare varati dal ministro della Pubblica Istruzione Paolo Boselli. Promulgati con il R.D. 25 settembre 1888 e redatti dal positivista Aristide Gabelli, i nuovi programmi attribuivano alla storia un ruolo importante in ordine alla formazione dello spirito critico e della coscienza civile e sociale. Era previsto che nelle prime due classi elementari il maestro raccontasse solo qualche fatto tratto dalla storia degli Ebrei, dei Greci e dei Romani capace di suscitare l'attenzione e di stimolare la fantasia dei bambini non in grado di assimilare e memorizzare nozioni di carattere storico. L'inizio dell'apprendimento della storia era fissato a partire dalla classe III, con l'introduzione dei principali avvenimenti dell'epoca risorgimentale[66]. Nella classe IV, invece, gli alunni studiavano la storia medievale e romana, mentre quelli di V la storia moderna e risorgimentale con particolare attenzione a Casa Savoia e agli uomini che avevano concorso all'unificazione del Paese, ovvero Vittorio Emanuele II, Cavour e Garibaldi. È da rilevare che l'approccio biografico-narrativo tendeva a prevalere in tutte le classi. Fare leva sulle doti umane e morali di un personaggio consentiva all'insegnante di sollecitare la fantasia degli allievi nonché il desiderio di emularne le virtù.

Dopo pochi anni, nel novembre del 1894, erano emanati nuovi programmi per la scuola primaria dal ministro Guido Baccelli[67]. Lo animava la volontà di semplificare e alleggerire l'insegnamento trasmesso da questo ordine di studi, nella convinzione che esso dovesse configurarsi non come preparazione a istituti secondari, ma come luogo di formazione del popolo ai doveri della vita civile. Si comprende, alla luce di tali preoccupazioni, la scelta di unire in un unico raggruppamento alcune materie, quali, appunto, storia, geografia e diritti e doveri del cittadino. A queste discipline, e soprattutto alla storia, era attribuito il compito di forgiare l'identità nazionale, che, nel quadro delle contrapposizioni e dei conflitti che segnavano la vita sociale dell'Italia crispina di fine Ottocento, rappresentava l'obiettivo educativo prioritario dell'istruzione elementare[68].

[65] Da segnalare in proposito, oltre alla riforma dei programmi delle scuole normali, le Conferenze pedagogiche, promosse nei primi anni Ottanta dal ministro della Pubblica Istruzione Guido Baccelli in alcune città capoluogo di provincia, con l'intento di incoraggiare l'aggiornamento culturale, didattico e metodologico dei maestri già in servizio. In merito, insieme al testo già citato nella nota precedente, si veda L. Rosati, *Le conferenze pedagogiche. Una esperienza di aggiornamento degli insegnanti (1881-1885)*, Città di Castello, S.T.E., 1975.

[66] Come è noto, con il terzo anno, in virtù della legge Coppino del 15 luglio 1877, si concludeva il ciclo obbligatorio e molti alunni abbandonavano la scuola elementare; con i nuovi programmi essi potevano lasciare la scuola avendo appreso qualche nozione relativa all'unificazione nazionale.

[67] Si rinvia in proposito a Lombardi, *I programmi per la scuola elementare dal 1860 al 1985*, cit., pp. 62-63.

[68] Si veda Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale*, cit., pp.

Mentre nelle prime due classi erano cassati i racconti tratti dalla storia antica, in quanto non in sintonia con l'impostazione data all'insegnamento di storia, in III erano trasmessi racconti attinenti agli eventi notevoli e ai protagonisti della storia italiana dal 1848 al 1870. In IV l'insegnamento verteva sulla storia romana e su quella medievale, mentre in V su quella moderna e, ancora, su quella del Risorgimento italiano.

In seguito al riordino del corso elementare, esito della legge Orlando del 1904, vennero emanati nuovi programmi nel 1905 ad opera del ministro della Pubblica Istruzione Francesco Orestano[69]. Di impostazione herbartiana, essi sono connotati da «minuziosità» e «enciclopedismo» sia nella parte riguardante i contenuti sia in quella contenente le istruzioni per le singole discipline[70]. Dovendo, la scuola elementare, più nettamente che in passato in virtù della riforma Orlando, sia preparare agli studi secondari sia offrire un corso completo di contenuti e cognizioni, i programmi prevedevano che la «preparazione formale» fosse contemperata dalla «istruzione concreta»[71]. La prima, come spiega lo stesso testo programmatico, era intesa a «disciplinare e a sviluppare le facoltà mentali dell'alunno: ragionamento, osservazione, riflessione, memoria, fantasia, potere di espressione»[72]. Perseguivano questi obiettivi lingua italiana, aritmetica e geometria, calligrafia e disegno. La storia, insieme alla geografia, alle «lezioni di cose» e alle nozioni varie rientrava invece fra gli «insegnamenti speciali», il cui fine era quello di «estendere la informazione positiva e concreta della realtà», ovvero di fare comprendere al ragazzo il contesto storico e naturale in cui era immerso, sia per rispondere al suo bisogno istintivo di sapere, sia per attrezzarlo alla vita del lavoro[73].

La storia non era insegnata nelle prime due classi, mentre in III il maestro avrebbe dovuto narrare, servendosi di racconti storici, dei fatti e degli uomini più notevoli dell'Italia, con particolare riguardo alle singole regioni, dal 1848 al 1870. Al fine di conseguire tale scopo, il docente poteva anche partire dai nomi delle piazze e delle vie o dai monumenti che rievocavano uomini e fatti di quel periodo. Nella classe IV si raccomandavano racconti relativi ai fatti notevoli della storia romana e delle vite di grandi uomini della medesima epoca. Storia e geografia erano raggruppate in V e VI: in V bisognava fornire agli alunni il quadro storico dell'Italia dalla caduta dell'Impero romano fino al 1815, con particolare riguardo alle biografie degli italiani illustri. Nell'ultimo anno di scuola il maestro doveva raccontare la storia civile dell'Italia nel secolo XIX, anche in relazione ai fatti economici.

104-115.

69 Cfr. Lombardi, *I programmi per la scuola elementare dal 1860 al 1985*, cit., pp. 186-294.

70 *Ibid*., p. 187.

71 *Ibid*., p. 201.

72 *Ibid*., p. 218.

73 *Ibid*., p. 219 e p. 243.

Dall'analisi dei libri di storia utilizzati nelle scuole elementari nei quarant'anni successivi all'Unità[74], è possibile capire il momento in cui anche la figura di Garibaldi è riuscita a ritagliarsi uno spazio all'interno di questa disciplina. Come osservato dalle ricerche in merito, si possono individuare tre periodi nella produzione della manualistica di storia[75]. Il primo riguarda gli anni successivi all'Unità ed è caratterizzato dall'adozione di libri già in circolazione nelle scuole degli Stati preunitari, alcuni dei quali ristampati tenendo conto delle necessarie integrazioni e correzioni previste dai programmi didattici di Terenzio Mamiani, e di altri di nuova concezione e decisamente più aderenti alle indicazioni contenutistiche, culturali e metodologiche presenti nel testo programmatico del 1860. Nella maggior parte di questi testi le vicende narrate si fermavano alla nascita del Regno d'Italia. Centrale, nella ricostruzione proposta di queste stesse vicende, era il ruolo di Casa Savoia e su tutti primeggiavano le figure di Vittorio Emanuele II e del suo primo ministro il conte di Cavour. In questi stessi testi assenti o scarsi erano i riferimenti a Mazzini e al ruolo svolto dai suoi seguaci nei moti insurrezionali e molto ridimensionato risultava il contributo dato da Garibaldi, le cui imprese erano comunque ricondotte alle decisioni politiche e militari della Monarchia.

Il secondo periodo individuato riguarda gli anni compresi fra il 1865 e il 1880: i manuali prodotti in questa fase tendono a spostare gradualmente in avanti il termine della narrazione degli eventi della storia italiana, che giungono fino alla morte di Vittorio Emanuele II nel 1878. Si assiste inoltre al superamento della prospettiva dinastica-moderata e all'affermazione di «una concezione del Risorgimento nazionale maggiormente attenta al ruolo giocato dalle correnti democratiche e, in particolare, alla dimensione nazional-popolare del processo di unificazione della penisola»[76].

Nel corso del terzo periodo, relativo all'ultimo ventennio del XX secolo, la manualistica asseconda il progetto pedagogico della Sinistra storica, fortemente sostenuto dalla pedagogia del positivismo, volto a rinforzare il ruolo della scuola, di cui veniva sottolineato il carattere laico, nella sua formazione del

74 Per un approfondimento sulla manualistica scolastica dopo l'unificazione nazionale si rimanda a I. Porciani, *Il libro di testo come oggetto di ricerca: i manuali scolastici nell'Italia postunitaria*, in *Storia della scuola e storia d'Italia dall'Unità ad oggi*, Bari, De Donato, 1982, pp. 237-271; M. Raicich, *I libri per le scuole e gli editori fiorentini del secondo Ottocento*, in I. Porciani (ed.), *Editori a Firenze nel secondo Ottocento. Atti del Convegno (13-15 novembre 1981) Gabinetto scientifico letterario di G.P. Vieusseux*, Firenze, Olschki, 1983, pp. 297-340; G. Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, Brescia, La Scuola, 2000; C. Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento. La tradizione toscana e le nuove realtà del primo Novecento in Italia*, Firenze, Pagnini, 2004; G. Chiosso, *Libri di scuola e mercato editoriale. Dal primo Ottocento alla Riforma Gentile*, Milano, FrancoAngeli, 2013. Sugli editori scolastici italiani si vedano i lavori di G. Chiosso (ed.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003; Id., *TESEO '900. Editori scolastico-educativi del primo Novecento*, Milano, Editrice Bibliografica, 2008.

75 A tal proposito si rimanda a Ascenzi, *Metamorfosi della cittadinanza*, cit., pp. 19-38.

76 *Ibid*., p. 31.

sentimento nazionale. Di qui l'adozione di moduli comunicativi e linguistici che enfatizzavano la connotazione sacra della storia del Risorgimento e dei suoi protagonisti, tra i quali figuravano ora a pieno titolo anche Garibaldi e Mazzini[77]. È questa una tendenza che trova, in questi stessi anni, una insuperata sintesi nel già ricordato *Cuore* in cui si fa un «uso mitopoietico della storia», avviando «un nuovo modello di storia sacra, su base patriottica» sostitutiva della storia sacra propriamente detta[78]. Consistente è la redazione di biografie e, innanzi tutto, di quelle di Vittorio Emanuele II dopo la sua morte.

Dall'analisi delle proposte didattiche dei periodici destinati alla classe magistrale e consultati per la presente ricerca, è emerso che, nei numeri pubblicati intorno al 1907 (ovvero in coincidenza con l'anniversario della nascita di Garibaldi), si dava conto della figura dell'Eroe e delle sue imprese specialmente all'interno della sezione didattica. L'analisi comparativa effettuata su tali riviste ha consentito di mettere in luce che la rievocazione del nizzardo fu maggiore nelle pagine riservate all'insegnamento della storia[79], anche se di lui si faceva menzione pure in altre discipline. In particolare si può affermare che, in queste pagine, si parla sempre di Garibaldi, ma pochi sono i riferimenti espliciti al I centenario della nascita e all'anniversario della morte (2 giugno). Ad esempio la sezione didattica del periodico «La Scuola», pur ricordando Garibaldi e le sue imprese, non evocava le due ricorrenze. Nell'anno scolastico 1906-1907, dunque in prossimità dell'anniversario della sua nascita, la figura di Garibaldi compariva nel programma di storia sia della classe III che, in modo particolare, della classe VI come previsto dai programmi vigenti. All'inizio di quest'anno scolastico[80] la rivista ricordava ai maestri di parlare agli studenti di III, oltre che di Vittorio Emanuele II e di Cavour, soprattutto di Garibaldi, il cui merito era stato quello di aver guidato la spedizione delle Due Sicilie. In quello stesso anno scolastico[81], pur non essendo previsto dai programmi ministeriali del 1905, la rivista invitava i maestri, qualora lo avessero ritenuto opportuno, a presentare agli alunni di IV un confronto tra il dittatore romano Cincinnato e la figura di Garibaldi. Con riferimento invece alla classe VI, la sezione didattica della storia raccomandava al corpo docente di richiamare alla memoria degli alunni i grandi italiani che avevano lottato ed erano morti per liberare la patria. Tra questi doveva figurare Garibaldi, al quale, secondo il periodico, si potevano dedicare alcune lezioni.

77 Oltre al saggio di Ascenzi, citato nella nota precedente, si veda in proposito anche Soldani, *Il Risorgimento a scuola: incertezze dello stato e lenta formazione di un pubblico di lettori*, cit., pp. 154 ss.

78 Traniello, *Nazione e storia nelle proposte educative degli ambienti laici di fine Ottocento*, cit., p. 66.

79 Si tenga presente che, fra i periodici consultati, solo «Il Corriere delle Maestre», «I Diritti della Scuola», «La Scuola», «La Tribuna Scolastica» e «Scuola Italiana Moderna» contenevano una parte dedicata allo svolgimento didattico dei programmi scolastici.

80 «Didattica», classe III, *Storia*, Sc, vol. X, n. 1, 2 ottobre 1906, p. 7.

81 «Didattica», classe IV, *Storia*, *ibid*., vol. X, n. 9, 12 dicembre 1906, p. 89.

Sono significative anche le tracce di lezione di storia che nella «Didattica» di «Scuola Italiana Moderna»[82] vengono offerte come guida ai maestri. La rivista bresciana, attiva dal 1893 e sorta nell'alveo dell'intransigentismo cattolico, non menziona le ricorrenze garibaldine tra le pagine della sezione didattica, ma fa alcuni riferimenti al nizzardo. Infatti, consultando gli anni scolastici 1906-1907 e 1907-1908, emerge che, per l'insegnamento di storia, la rivista prevedeva che i maestri parlassero di Garibaldi e della liberazione della Sicilia alle classi III e VI. Se, in sintonia con l'impostazione culturale che la ispirava, la rivista definiva la marcia di Garibaldi su Roma come un «moto insensato»[83], essa, in generale, formulava un moderato apprezzamento di Garibaldi, della spedizione in Sicilia e nell'Italia meridionale. Infatti, ogni volta che l'Eroe era citato nelle tracce di lezione di storia, si sottolineava che egli aveva avuto un posto rilevante nel movimento dell'Indipendenza italiana e che l'avvenimento più importante della sua vita militare era stato la conquista delle Due Sicilie[84].

Secondo «Scuola Italiana Moderna», la narrazione della biografia di Garibaldi era un argomento che i maestri avrebbero dovuto affrontare in entrambe le classi (III e VI). Nella classe III[85] si sarebbe dovuto dare rilievo al coraggio straordinario e al disprezzo della morte che egli aveva mostrato fin dalla sua fanciullezza, mettendo in luce il suo carattere fiero e ardito, la sua sete di libertà e la sua vicinanza agli oppressi. Con riferimento alla classe VI[86] si consigliava ai maestri di far leggere ai loro alunni la *Storia dei Mille narrata ai giovinetti* di Abba. Gli insegnanti potevano ricordare a questi scolari specialmente la mitezza e la generosità di Garibaldi: la rivista si preoccupava di precisare che egli era stato guerriero per le esigenze della patria, ma che non aveva mai avuto superbe mire di conquista e che anzi si sarebbe accontentato della semplice vita dei campi.

Assumevano una linea diversa, rispetto a quella sin qui illustrata, tre riviste, che invece richiamavano i maestri a ricordare in classe anche le ricorrenze garibaldine. La prima era «I Diritti della Scuola» che, nell'anno scolastico 1905-1906 all'interno della rubrica didattica «La scuola in azione», dichiarava di voler dedicare al Generale dei Mille alcune lezioni di storia per dare risalto alla sua figura proprio in prossimità della ricorrenza del 2 giugno. Infatti nel mese di maggio la sezione didattica relativa alla storia consigliava ai docenti di

82 Sulla rivista scolastica cattolica bresciana si veda almeno la scheda curata da G. Chiosso in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 622-627.

83 «Didattica», classe VI, *Storia*, «Scuola Italiana Moderna» (d'ora in avanti cit.: SIM), vol. XVI, n. 25, 25 aprile 1908, p. 403. Sulla costruzione e l'affermazione di una versione negativa del mito di Garibaldi specialmente nella pubblicistica cattolica si rinvia a M. Isnenghi, *Una storia parallela. L'anti-mito garibaldino*, in S. Rota Ghibaudi e F. Barcia (edd.), *Studi politici in onore di Luigi Firpo*, Milano, FrancoAngeli, 1990, Vol. III, pp. 467-486.

84 «Didattica», classe III, *Storia*, SIM, vol. XV, n. 17, 22 febbraio 1907, p. 266; «Didattica», classe III, *Storia*, *ibid.*, vol. XV, n. 22, 6 aprile 1907, p. 343.

85 «Didattica», classe III, *Storia patria*, *ibid.*, vol. XVI, n. 32, 13 giugno 1908, p. 510.

86 «Didattica», classe VI, *Storia*, *ibid.*, vol. XVI, n. 22, 28 marzo 1908, p. 355.

ricordare ai fanciulli che in memoria di Garibaldi erano stati eretti monumenti in tutte le città italiane ed anche all'estero; che non c'era paese che non gli avesse dedicato una delle sue vie e delle sue piazze, perché ovunque egli era passato, nei luoghi dove si era fermato anche solo per breve tempo, era stata apposta una lapide per attestare il suo passaggio. Lo si doveva insomma presentare come uno dei principali fautori dell'Unità italiana, ripercorrendo le tappe della spedizione dei Mille, sotto il regno di Vittorio Emanuele II. Per l'anniversario della morte di Garibaldi, gli insegnanti della classe IV erano sollecitati a pronunciare parole di commemorazione dell'Eroe «che, degli antichi e semplici Romani della Repubblica, ebbe la gloria e le modeste virtù»[87]. Il confronto proposto tra Garibaldi e il popolo dell'antica Roma non era casuale, dato che la storia romana risultava, da programma ministeriale, argomento di studio del quarto anno. Per lo svolgimento di questa lezione i maestri erano esortati a fare riferimento ai cenni dati dalla Redazione per la classe III[88] e ad utilizzare eventualmente la *Storia dei Mille narrata ai giovinetti* di Abba e *Cuore* di De Amicis, ma anche la ricca biografia di Giuseppe Guerzoni, per trovare qualche pagina forte e vibrante sull'epopea garibaldina da leggere alle scolaresche[89]. Per la medesima ricorrenza del 2 giugno, sempre durante le ore della lezione di storia, i maestri erano tenuti a commemorare il Generale anche nella classe V[90].

L'altra rivista che rievocava gli anniversari garibaldini era «La Tribuna Scolastica»[91] che, sul numero del 3 giugno 1905[92], nella sezione didattica intitolata «Nella scuola. La nostra didattica», invitava i maestri, durante le lezioni di storia, a ricordare il pellegrinaggio alla tomba dell'Eroe a Caprera che si era svolto nel 1892 a distanza di dieci anni dalla sua scomparsa, in virtù del fatto che di lì a due anni si sarebbero celebrati il venticinquesimo anniversario della morte di Garibaldi e il centenario della sua nascita.

Un riferimento esplicito al centenario compariva anche nella sezione didattica de «Il Corriere delle Maestre», che nell'anno scolastico 1906-1907[93] per l'insegnamento di «Nozioni varie. Fatti e uomini più notevoli del Risorgimento», invitava i maestri a parlare di Garibaldi perché in quell'anno

87 «La scuola in azione», classe IV, *Storia*, «I Diritti della Scuola» (d'ora in avanti cit.: DS), vol. VII, n. 33, 27 maggio 1906, p. 379.

88 La rivista prevedeva, per il terzo anno di scuola, una lezione d'occasione per l'anniversario della morte di Garibaldi. Si veda «La scuola in azione», classe III, *Storia*, *ibid*.

89 L'opera di Guerzoni (*Garibaldi*, Firenze, Barbera, 1882) è ritenuta dagli studiosi la «più equanime e rigorosa biografia dell'Eroe scritta nell'Ottocento»: S. La Salvia, *Le «vite» di Garibaldi*, «Rassegna degli Archivi di Stato», vol. XLII (1982), n. 1, pp. 320-359 (la citazione a p. 349).

90 «La scuola in azione», classe V, *Storia*, DS, vol. VII, n. 33, 27 maggio 1906, p. 382.

91 Sulla rivista magistrale milanese di chiare tendenze laiche e pubblicata dal 1904 al 1909, cfr. la scheda curata da R. Sani in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 700-701.

92 «Nella scuola. La nostra didattica», classi V e VI, *Geografia e Storia*, «La Tribuna Scolastica» (d'ora in avanti cit.: TS), vol. I, n. 32, 3 giugno 1905, p. 383.

93 «La didattica pratica del Corriere delle Maestre», classe III, *Nozioni varie*, CdM, vol. X, n. 24-25, 24 marzo 1907, p. 267.

si festeggiava l'anniversario della sua nascita. Per l'occasione, tra marzo e giugno del 1907, si faceva riferimento all'Eroe nella classe III delle scuole a corso incompleto, in cui il maestro era sollecitato a presentare la biografia di Garibaldi.

L'analisi delle riviste didattiche documenta che il posto che Garibaldi ebbe nella scuola italiana non restò circoscritto all'insegnamento di storia, ma trovò spazio anche in altre discipline; si deve altresì constatare che il suo ricordo aumentava con l'avvicinarsi della ricorrenza della morte, più che in prossimità del centenario della nascita. Ne «La didattica pratica del Corriere delle Maestre», nella sezione «Lingua italiana» (che comprendeva: lettura, dettatura, grammatica, conversazione, composizione, esercizi di memoria), il rinvio a Garibaldi aveva una certa frequenza, ma non compariva alcun riferimento al centenario della nascita. Ad esempio nell'anno scolastico 1907-1908, nel mese di maggio si trovava un esercizio di dettatura ideologica destinato alla classe III; il testo recitava così:

> Se ne va il maggio, il bel maggio fiorito, dai ricordi gloriosi. Tante battaglie sacre alla libertà si sono combattute a' tuoi splendidi soli. Il cinque maggio i Mille salparono da Quarto per recarsi in Sicilia e pure in questo mese Giuseppe Garibaldi combatteva vittorioso a Varese e a San Fermo. Ora il maggio non sorrida più alle guerre sanguinose, ma all'amore di tutti gli uomini e alle feste del lavoro[94].

Negli esercizi di dettatura per l'anno scolastico 1906-1907 per la classe V era previsto un brano che parlava dell'animo mite e caritatevole di Rosa Garibaldi e di quanto questa donna avesse inciso sull'educazione del figlio. Così si legge nel periodico: «Ella sola seppe formare quell'animo, forte, altero e nello stesso tempo gentile e tenero»[95]. Per la classe VI[96] la rivista proponeva altri due brani da dettare: il primo era dedicato al sogno premonitore fatto da Garibaldi sulla morte della madre; il secondo riguardava il canto soave di un usignolo che il Generale si arrestò ad ascoltare durante la guerra del 1859 contro gli austriaci.

Avvicinandosi l'anniversario della morte di Garibaldi, l'attenzione della rivista nei confronti dell'Eroe aumentava. Nell'anno 1907-1908, agli insegnanti della classe IV era consigliato dal periodico di riprendere le parole con cui De Amicis aveva descritto Garibaldi in *Cuore* e di utilizzarle per lo svolgimento di un dettato ideologico[97]; come esercizio di conversazione, il 2 giugno, invece, ai maestri era suggerito un testo che così recitava:

[94] «La didattica pratica del Corriere delle Maestre», classe III, *Dettato ideologico*, *ibid*., vol. XI, n. 33, 2 maggio 1908, p. 365.

[95] «La didattica pratica del Corriere delle Maestre», classe V, *Dettatura*, *ibid*., vol. X, n. 33, 26 maggio 1907, p. 367.

[96] «La didattica pratica del Corriere delle Maestre», classe VI, *Dettatura*, *ibid*., p. 369.

[97] «La didattica pratica del Corriere delle Maestre», classe IV, *Dettatura*, *ibid*., vol. XI, n. 34, 31 maggio 1908, p. 379.

Le avete viste fuori, alle finestre e ai balconi, le bandiere abbrunate? È questo un giorno di lutto e di dolore per l'Italia, perché ricorda la morte di quell'incomparabile eroe che fu Giuseppe Garibaldi. […] Garibaldi non fu soltanto un uomo valoroso e buono, ma fu come l'emanazione di tutto il popolo d'Italia che, schiavo e diviso, attendeva il suo eroe che lo guidasse alla libertà[98].

Come esercizio di composizione, infine, veniva indicato il seguente tema: *Narrate qualche cosa di ciò che sapete su Giuseppe Garibaldi*[99].

Dalle considerazioni svolte si deduce che l'anniversario del 4 luglio 1907 non fece registrare un aumento significativo di interventi riguardanti Garibaldi nelle sezioni didattiche dei periodici presi in esame. A questa ricorrenza furono però dedicati articoli anche in altre rubriche da alcune delle riviste consultate. «Il Corriere delle Maestre» nel 1907 prevedeva un supplemento intitolato *Per il Centenario della nascita di Giuseppe Garibaldi. Inno delle scuole italiane*[100] in cui era riprodotto lo spartito musicale di un inno, le cui parole erano state scritte dal direttore della rivista Guido Fabiani[101].

Le strofe erano tutte incentrate sui luoghi delle principali imprese compiute da Garibaldi, mentre il ritornello recitava: «Gloria a Te, fin che risplenda bello il sol di libertà! Gloria a Te da ognun si renda fin che il mondo vita avrà!»[102]. Merita segnalare che questo supplemento rappresenta un evento unico nel panorama della stampa magistrale, considerata per questa ricerca.

Su «La Scuola» si trovano invece alcuni interessanti riferimenti al centenario della nascita di Garibaldi quale, ad esempio, l'articolo intitolato *L'anniversario*[103], pubblicato proprio all'inizio del mese di luglio del 1907 nella sezione denominata «Rivista Minima. Lettere-Scienze-Arti-Varietà» e che tratteggiava un profilo dell'Eroe. Di lui si diceva:

Fu Egli, il titano, un focolare di energie da cui ognuno può attingere la forza necessaria per compiere utilmente la propria missione, nella vita; fu la leva più potente del nostro riscatto; apparve come una meteora, le cui tracce luminose perdurano attraverso i secoli e si diffondono nella moltitudine dei cuori per rinnovare i miracoli dell'amore e dell'eroismo.

Della sua vita si sottolineava lo spirito di sacrificio, la sua «sovrumana bellezza morale» e lo si definiva un «audace spirito ribelle». Egli era additato come esempio di eroismo da seguire da parte dei maestri nella quotidianità

98 «La didattica pratica del Corriere delle Maestre», classe IV, *Conversazione*, *ibid*.

99 «La didattica pratica del Corriere delle Maestre», classe IV, *Comporre*, *ibid*.

100 *Per il centenario della nascita di Giuseppe Garibaldi. Inno delle scuole italiane*, *ibid*., vol. X, n. 24-25, 24 marzo 1907, pp. 1-8.

101 Su Guido Fabiani (1869-1947), dapprima (1891) redattore capo del periodico «Il Risveglio educativo» e poi dal 1897 fino al 1939 direttore de «Il Corriere delle Maestre», si veda la scheda biografica curata da L. Lombardi in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, cit., Vol. I, pp. 512-513.

102 *Per il centenario della nascita di Giuseppe Garibaldi. Inno delle scuole italiane*, cit., p. 2.

103 Josina, *L'anniversario*, Sc, vol. X, n. 36, 1 luglio 1907, p. 273.

della vita scolastica e delle battaglie condotte a favore della professione. La rivista osservava:

> Quale altra figura più bella potrebbe sostenerci nelle lotte che noi combattiamo per il miglioramento della Scuola e dei maestri? Quale esempio migliore potrebbe disciplinare e spronare il nostro spirito alle giuste rivendicazioni di classe, a realizzare e ad accrescere i vantaggi dell'opera educativa?[104]

Sempre nel mese di luglio, in ricordo del centenario, e ancora nella sezione «Rivista Minima. Lettere-Scienze-Arti-Varietà», compariva l'articolo *Commemorazioni garibaldine*[105] che segnalava gli eventi che si erano tenuti in varie parti d'Italia il giorno 4 luglio per celebrare il centenario della nascita di Garibaldi. Da Bagnara Calabra, in provincia di Reggio Calabria, dove si era svolto un corteo composto dagli alunni delle scuole comunali, dai maestri, dal direttore didattico e dall'assessore della Pubblica Istruzione, accompagnato dalla musica e da una folla di cittadini, a Prato, in Toscana, dove la classe magistrale aveva organizzato un banchetto in onore di Giuseppe Crocini, il quale da giovane aveva combattuto al fianco dell'Eroe per poi tornare a fare il maestro. Da Cassano all'Ionio, in provincia di Cosenza, dove il maestro Vincenzo Seminara aveva pronunciato un discorso d'occasione alla scolaresca riunita nella grande sala municipale a Portici, in provincia di Napoli, dove, per iniziativa dell'amministrazione comunale, la celebrazione garibaldina aveva avuto luogo nel teatro cittadino alla presenza delle autorità locali, civili e militari, del corpo insegnante e di una rappresentanza della scolaresca. Anche nel piccolo paese di Staggia Senese, frazione di Poggibonsi in provincia di Siena, era stato programmato un corteo di tutti gli alunni delle scuole e l'insegnante Caterina Marchetti aveva tenuto una conferenza sulla figura di Garibaldi. Mentre a Bozzolo, in provincia di Mantova, gli alunni delle elementari insieme agli scolari del vicino Comune di San Martino dell'Argine avevano portato una corona d'alloro al busto di marmo di Garibaldi posto al centro della Loggia municipale[106]. Il maestro Edoardo Rossi, su incarico del sindaco, aveva commemorato l'Eroe tratteggiandone le gesta e ricordando ai giovinetti i più gloriosi episodi della sua vita. Il maestro Boldi di San Martino aveva invece spiegato loro il significato della festa.

Nello stesso mese, «La Scuola» proponeva anche l'articolo *L'anima degli occhi*[107], firmato dal noto medico Paolo Mantegazza[108]. Nella prima parte di

104 *Ibid*.

105 *Commemorazioni garibaldine*, «Rivista Minima. Lettere-Scienze-Arti-Varietà», Sc, vol. X, n. 37, 15 luglio 1907, p. 278.

106 *Ibid*.

107 P. Mantegazza, *L'anima degli occhi*, Sc, vol. X, n. 38, 30 luglio 1907, pp. 281-283.

108 Su Paolo Mantegazza (1831-1910) si vedano almeno la scheda biografica curata da A. Carli in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, cit., vol. II, pp. 89-90, e quella edita dal *Dizionario Biografico degli Italiani*, cit., vol. 69 (2007), pp. 170-175.

questo contributo l'autore dava una spiegazione accurata dell'occhio da un punto di vista prettamente anatomico; dopo questa descrizione egli affermava: «guardando due occhi umani possiamo dire quanto genio, quanta forza di volontà vi stiano celati e sian pronti alla lotta». Ed a questo punto egli scriveva di Garibaldi:

> Tutti i grandi conquistatori salvatori di popoli o eroi condottieri di uomini ebbero occhi fulminei, che facevano abbassare tutto il volgo umano e piegarlo alla propria volontà. […] per conto mio li ho visti in Garibaldi le quattro volte che io ebbi la fortuna di veder da vicino quel vero 'superuomo'.

Il racconto proseguiva offrendo al lettore questa rappresentazione dell'Eroe:

> La prima volta [che lo vidi] egli era a cavallo sulla piazza di Luvino […]. Aveva il volto acceso, le bionde chiome gli accarezzavano le spalle e dopo un galoppo festoso dinanzi ai suoi militi improvvisati si fermò sugli arcioni e li guardò. Disse poche parole, […] ma quel che non dissero le labbra, dicevano gli occhi. Occhi […] che quando ti guardavano ti prendevano ogni cosa, gli occhi tuoi, il tuo cuore, tutta l'anima[109].

Anche «La Scuola Popolare»[110], di area socialista, ricordava, tra le sue pagine, l'anniversario della nascita di Garibaldi. Il fascicolo del 1° luglio 1907 riproduceva il testo dell'orazione *Per la morte di G. Garibaldi* (1882) pronunciata da Carducci e nella quale il poeta, appena mancato, aveva definito l'Eroe «il più popolarmente glorioso degl'italiani moderni, forse perché [aveva riunito] in sé le qualità molteplici della nostra gente, senza i difetti e i vizi che quelle rasentano o esagerano o mentono»[111]. Il mese successivo lo stesso periodico pubblicava un articolo dal titolo *La grande apoteosi garibaldina…*, che criticava il «patriottismo obbligatorio di circostanza» emerso durante le commemorazioni garibaldine celebratesi il 4 luglio a Milano e a Roma. Tutti i giornali avevano sottolineato il «palpito nazionale» di quei giorni, ma secondo la rivista quelle celebrazioni avevano rappresentato eventi meramente formali. «A Milano, – si legge – i buoni moderati fecero una luminaria, come se si fosse trattato di una madonna del Carmine qualsiasi, e fecero più del loro dovere». A Roma, invece, riferiva l'autore: «ho veduto coreografie ancora più sciocche e ridicole. I garibaldini si erano moltiplicati per la circostanza prodigiosamente. Certi ceffi […] facevano bella mostra della camicia rossa in ogni più lurida bettola dell'urbe. […] c'è stato un pavoneggiamento ostentato di garibaldini

109 Mantegazza, *L'anima degli occhi*, cit., p. 282.

110 Questa rivista, che era l'organo della Sezione insegnanti della Camera del lavoro di Milano, aderente all'Unione magistrale, fu pubblicata a Milano tra il 1906 e il 1913. Si veda la scheda curata da R. Sani in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 652-653.

111 G. Carducci, *Garibaldi*, «La Scuola Popolare» (d'ora in avanti cit.: SP), vol. II, n. 24, 1 luglio 1907, p. 1. Più in generale sul rapporto fra il poeta e l'Eroe del Risorgimento cfr. G. Spadolini, *Fra Carducci e Garibaldi*, Firenze, Edizioni della Cassa di Risparmio di Firenze, 1981.

veri e falsi»[112]. Garibaldi, osservava il foglio socialista, oltre che l'anima dell'unificazione italiana, era stato un uomo semplice e austero, perciò non meritava quelle ipocrisie.

Il bollettino associativo «Vita Magistrale Milanese», nel numero di giugno-luglio 1907, ospitava un articolo intitolato *L'eterna questione*[113] di fatto relativo all'annoso problema del mancato aumento degli stipendi dei maestri, ma che menzionava il ruolo svolto in quel periodo dalle scuole nell'anniversario garibaldino. Nel dare conto del confronto tra i maestri e i «saggi Amministratori»[114] dei diversi comuni italiani, i quali lamentavano che gli insegnanti, prima molto ossequiosi e sottomessi, erano ora invasi dalla mania del denaro, si coglieva l'occasione per ricordare che, in quei giorni, proprio gli stessi maestri non si erano sottratti al loro compito di educatori e si erano prodigati nelle diverse rievocazioni delle figura di Garibaldi che avevano coinvolto le scolaresche.

Anche «Scuola Italiana Moderna» ricordava la figura di Garibaldi e il centenario della nascita in più articoli. Nell'articolo *Maestre garibaldine*[115], apparso nel fascicolo del gennaio del 1907, si dava conto, con una certa ironia, della volontà espressa da una parte del mondo magistrale femminile di recarsi a Marsala per apporre una lapide in ricordo di Garibaldi. Nel luglio di quell'anno, ovvero nel mese della celebrazione del centenario della nascita, il periodico pubblicava altri due contributi sul nizzardo. In uno dava conto della questione legale che aveva coinvolto la famiglia di Garibaldi: dopo la sua morte, infatti, essa aveva dovuto affrontare una lunga serie di controversie a causa delle disposizioni testamentarie da lui lasciate[116].

Il secondo testo era più ampio e era espressamente dedicato alla figura di Garibaldi[117]. Esso prendeva le mosse dalle prime tappe della vita del Generale, dalla sua formazione all'avvicinamento alle idee di Saint-Simon e alla causa rivoluzionaria dopo l'incontro con Mazzini, fino al periodo passato in Sud America. Della spedizione dei Mille in Sicilia si scriveva che «[essa rappresentava] la parte maggiore avuta da Garibaldi nelle guerre dell'indipendenza» e che era stata «il principio della fama leggendaria che gli circondò la fronte». Si menzionavano poi i fallimentari tentativi messi in atto da Garibaldi per prendere Roma, specialmente quello del 1867 che era finito con la disastrosa sconfitta di Mentana. In proposito la rivista, polemicamente annotava: «i pontifici non erano davvero *que' vili* ch'egli [Garibaldi] s'era immaginato di poter fugare col calcio dei fucili»[118]. Dopo la caduta di Roma nel 1870, episodio cui si faceva solo un

112 Sigfrido, *La grande apoteosi garibaldina…*, SP, vol. II, n. 25, 1 agosto 1907, p. 3.
113 F. Cottino, *L'eterna questione*, VMM, vol. XIV, n. 6, giugno-luglio 1907, pp. 71-72.
114 *Ibid*., p. 71.
115 *Maestre garibaldine*, SIM, vol. XV, n. 11, 4 gennaio 1907, p. 81.
116 *In giro pel mondo*, *ibid*., vol. XV, n. 34, 1 luglio 1907, p. 258.
117 *Giuseppe Garibaldi (1807-1907)*, *ibid*., vol. XV, n. 34, 1 luglio 1907, pp. 266-268.
118 *Ibid*., p. 267.

rapido cenno, la rivista rilevava che Garibaldi era stato il più onorato fra quanti avevano concorso a formare l'Italia; più di Mazzini e di Cavour che, secondo il periodico cattolico, erano state le vere menti ispiratrici del Risorgimento, ma che erano passati in seconda linea, oscurati dal mito di Garibaldi. «Scuola Italiana Moderna» affermava di non condividere i titoli onorifici a lui attribuiti e di considerarli «varcanti […] ogni limite di esagerazione, – come semidio, nume, altro Cristo». Pur riconoscendo le virtù umane e militari del Generale, la rivista bresciana sosteneva che egli ricopriva nella storia italiana una posizione superiore a quella che in realtà gli spettava:

> La verità corrispose a tanta fama? G. Garibaldi ebbe, certo, splendide doti: generoso, disinteressato, ardente negli ideali della patria e dell'umanità, capitano ardito, focoso e convincente nel discorso; e fu cooperatore efficacissimo dell'unità d'Italia. Ma ciò non basta per formare di lui, come si vuole, il più grande cooperatore del risorgimento; ché, a parer nostro, restano sempre prima di lui il Mazzini ed il Cavour.

Il periodico scolastico cattolico non taceva poi sull'anticlericalismo di Garibaldi, che aveva saputo «discendere i più bassi gradi della volgarità», e concludeva osservando che se i poeti potevano trasfigurare i fatti oltre i confini umani, come aveva fatto Carducci nei suoi scritti, e accostare l'uomo alla divinità, ciò non era concesso allo storico, il quale era tenuto a ricostruire gli eventi basandosi unicamente «sulla nuda verità del documento». Per questa ragione «egli solo [lo storico] potrà dire la parola che definirà per sempre l'eroe leggendario»[119]. Si può rilevare, quindi, che se «Scuola Italiana Moderna», parlando di Garibaldi, non abbandonava le ironie, che avevano connotato anche in precedenza la stampa cattolica, né smetteva di stigmatizzarne con forza l'anticlericalismo e di ribadire la condanna della sacralizzazione della sua figura, pure mostrava di apprezzare il contributo da lui dato alla causa dell'unificazione nazionale, anche se comunque era ritenuto inferiore a quello di Cavour, Mazzini e Vittorio Emanuele II.

L'analisi compiuta ci consente in conclusione di affermare che il ricordo dell'anniversario della nascita di Garibaldi non catalizzò l'attenzione delle riviste magistrali che circolavano tra i maestri milanesi. Si può notare che a parlarne maggiormente furono «La Scuola», «La Scuola Popolare» e «Scuola Italiana Moderna». Non è casuale che proprio queste tre riviste dessero notizia dell'anniversario della nascita con più enfasi rispetto alle altre. «La Scuola» e «La Scuola Popolare» lo fecero con l'obiettivo di concentrarsi su una figura che il mondo socialista considerava un eroe. Invece «Scuola Italiana Moderna» pose l'attenzione su di lui in quanto se, da un lato, lo riconosceva come un protagonista importante del Risorgimento, dall'altro voleva correggere una certa lettura che dell'Eroe dei due mondi era prevalsa nel tempo. Il fatto che Garibaldi fosse ricordato dai due estremi, i socialisti e i cattolici, non era casuale

[119] *Ibid*., p. 268.

e dimostrava che, per quanto vi fosse accordo sul suo ruolo di protagonista nella storia risorgimentale, la sua figura divideva ancora l'opinione pubblica e, quindi, anche il mondo magistrale. Non è forse un caso che la cerimonia organizzata dal Comune di Milano il 20 giugno 1907 e che era rivolta alle scuole municipali, di cui si dirà a breve, non fu menzionata o commentata dalle riviste esaminate.

3. *Le scuole elementari di Milano e la celebrazione del centenario garibaldino*

La figura di Garibaldi e la rievocazione del centenario della sua nascita il 4 luglio del 1907 giungevano alle scuole elementari milanesi non solo tramite le lezioni di storia o di occasione come, in alcuni casi, suggerito dalle riviste ai maestri o tramite le biografie segnalate dai periodici agli insegnanti. Per volontà del Comune di Milano gli istituti primari cittadini, e nello specifico le classi del corso superiore e del corso popolare, presero parte alla commemorazione che l'amministrazione organizzò appositamente per loro.

Durante la seduta del Consiglio comunale del 3 giugno 1907, il sindaco Ettore Ponti informava i consiglieri che la Giunta aveva pensato di ricordare quella ricorrenza «con onoranze segnatamente intese ad ammaestrare i giovani nel culto del glorioso Eroe, e ad assistere i superstiti seguaci di un tanto condottiero». Al conseguimento del primo obiettivo, egli dichiarava, miravano iniziative già programmate nelle scuole: in specifico era previsto che agli alunni delle classi V e VI fosse donato il libro *Storia dei mille narrata ai giovinetti* «dovuto alla penna magistrale dell'Abba» e che a quelli di III e IV fosse distribuita copia del numero unico «Il buon amico» redatto dai maestri milanesi. Si doveva tenere anche un «imponente corteo» di studenti al monumento di Garibaldi in Largo Cairoli con partenza dal Castello Sforzesco in data ancora da decidere[120].

Al fine, invece, di realizzare il secondo obiettivo la Giunta proponeva al Consiglio comunale di elargire 40.000 £ alla Casa militare Umberto I di Turate (Milano) per il ricovero di veterani garibaldini e £ 10.000 alla Società Reduci Garibaldini di Milano. Il Sindaco chiudeva il proprio intervento auspicando il voto unanime, essendo il nome di Garibaldi «di gran lunga superiore a meschine discussioni di parte»[121].

Il richiamo di Ponti all'unità era la spia del clima acceso che connotava in quei giorni l'ambiente politico ambrosiano e, in specie, quello dell'associazionismo di reduci e veterani, proprio a proposito delle celebrazioni del centenario

[120] *Proposte di onoranze a Giuseppe Garibaldi, in occasione del centenario della sua nascita*, in *Atti del comune di Milano. Annata 1906-1907*, Milano, G. Civelli, 1908, p. 412.

[121] *Ibid.*, p. 413.

garibaldino[122]. Anche Milano, cioè, risentiva delle tensioni emerse in occasione della costituzione del Comitato parlamentare per le celebrazioni in seguito all'affidamento della presidenza onoraria al Re e che avevano portato alla formazione di un Comitato popolare. La sezione locale di tale organismo, a sua volta, si era rifiutata recisamente di coinvolgere il sindaco Ponti, uomo politico liberale alla guida di una Giunta clerico-moderata[123], in quanto ritenuto inadatto a comparire di fronte alla statua di Garibaldi, sul basamento della quale il Comitato intendeva apporre una targa di bronzo.

Nonostante l'appello del sindaco, tali frizioni si palesarono anche in Consiglio comunale. Teodoro Moneta, volontario garibaldino nel 1859 e poi nell'impresa dei Mille ma dimessosi dal Comitato popolare per le celebrazioni del centenario a causa dello «spirito partigiano ed esclusivista» che lo caratterizzava, contrario agli interessi superiori della patria[124], sottolineava come il tempo trascorso consentisse di cogliere l'importanza di Garibaldi dal punto di vista storico: egli assommava in sé virtù e atteggiamenti divergenti, ma ognuna di tali caratteristiche non esauriva la sua grandezza. Per queste ragioni, Moneta concordava con la proposta della Giunta e specialmente con «quella di educare la gioventù al culto di Garibaldi mediante la conoscenza della vita di lui, che fu tutta consacrata al bene, alla patria, alla verità»[125]. Al momento del voto, il consigliere radicale Agostino Ferrari dichiarò di essere contrario non perché non volesse celebrare l'Eroe dei due mondi, che egli venerava, ma perché di lui si voleva offrire un'immagine distorta, tacendo sulla sua profonda inimicizia nei confronti della Chiesa cattolica. Di qui l'intervento risentito del

122 Si veda in merito A. Arisi Rota, *Milano. Garibaldi e l'appropriazione della memoria (1907)*, in M. Tesoro (ed.), *La memoria in piazza. Monumenti risorgimentali nelle città lombarde tra identità locale e nazionale*, Milano, Effigie Edizioni, 2012, pp. 111-123. Già l'inaugurazione del monumento a Garibaldi, nel novembre del 1895, si era svolta in un clima teso; rigido era stato il controllo da parte delle forze dell'ordine al fine di scongiurare disordini, possibili vista l'alta partecipazione di popolo e l'arrivo di numerose delegazioni dell'associazionismo democratico provenienti dall'intera penisola.

123 Proprietario di una solida e innovativa industria tessile, con diversi stabilimenti in Lombardia, Ponti si prodigò in attività filantropiche e in campo politico, a livello nazionale – fu deputato e senatore – e a livello locale. Il lavoro compiuto come sindaco per l'organizzazione dell'Esposizione Internazionale del 1906 gli valse la concessione del titolo di marchese da parte del re Vittorio Emanuele III: cfr. la voce curata da C. Pavese in *Dizionario Biografico degli Italiani*, cit., Vol. 84 (2015), pp. 777-779. Più in generale sull'amministrazione di Ponti, che governò Milano dal 1905 al 1909, si veda: L. Tinelli, *L'attività del Consiglio comunale e della Giunta municipale di Milano dal 1901 al 1909*, in *Storia amministrativa delle Province lombarde*, III: *Il Comune di Milano*, Milano, Giuffré, 1970, pp. 123-186.

124 Arisi Rota, *Milano. Garibaldi e l'appropriazione della memoria (1907)*, cit., p. 117. Su Ernesto Teodoro Moneta, che a partire dagli anni Sessanta dell'Ottocento, tra l'altro, maturò convincimenti pacifisti e che, per la sua azione indefessa per la promozione della fratellanza fra le nazioni, ottenne il Premio Nobel per la pace nel 1907, si veda almeno la voce biografica redatta da F. Conti in *Dizionario Biografico degli Italiani*, cit., Vol. 75 (2011), pp. 630-634.

125 *Proposte di onoranze a Giuseppe Garibaldi, in occasione del centenario della sua nascita*, cit., p. 413.

cattolico Stefano Cavazzoni, che protestava perché quelle parole volevano requisire a «un partito una pagina di storia del Risorgimento nazionale»[126]. La seduta era chiusa da Ponti che proclamava approvata all'unanimità meno un voto la delibera, rammaricandosi per l'incidente che tuttavia non menomava il carattere universale che voleva avere la manifestazione[127].

L'andamento della discussione in Consiglio documenta, sia pure con lo stile asciutto delle verbalizzazioni, che anche l'iniziativa della Giunta comunale, intesa a ricordare il centenario della nascita del nizzardo nelle scuole non sfuggiva alle «strategie concorrenziali di appropriazione della memoria» di Garibaldi e del Risorgimento che segnavano e avrebbero continuato a segnare la storia italiana anche negli anni successivi[128].

Va detto che già dal mese di aprile, l'amministrazione municipale aveva avviato l'organizzazione dell'evento. Essa si mosse in due direzioni. Per un verso prese accordi con Giuseppe Cesare Abba e la casa editrice Bemporad in merito alla distribuzione dell'opera dello scrittore savonese sulla spedizione dei Mille e, per un altro, si preoccupò di verificare la posizione degli istituti primari della città circa il coinvolgimento degli alunni nel corteo al monumento di Garibaldi.

Circa il primo aspetto, l'assessore alla Pubblica Istruzione, Edoardo Mojana, scriveva a Abba per chiedergli se era disponibile a redigere un «libretto» su Garibaldi per l'occasione del centenario. Egli si diceva molto onorato per l'invito, che tuttavia doveva con grande dispiacere declinare in ragione «del tempo troppo breve» a disposizione per «fare cosa degna»[129]. L'amministrazione ambrosiana però non abbandonava l'idea inziale di coinvolgere uno dei più apprezzati autori di scritture educative e scolastiche e, in specie, uno dei maggiori divulgatori del mito di Garibaldi. Mojana, infatti, avanzava a Abba una proposta alternativa: distribuire fra gli alunni la *Storia dei mille narrata ai giovinetti*, edito da Bemporad nel 1904[130]. Lo scrittore accettava con entusiasmo e, contestualmente, l'editore fiorentino contattava il Comune per esprimere «compiacimento per l'occasione [offerta] di concorrere alla lodevolissima opera di educazione morale e civile» e per formulare un preventivo di spesa[131]. L'accordo definitivo fra le parti prevedeva l'acquisto di 5.100 copie dell'edizione illustrata[132].

126 *Ibid*., p. 414.

127 La delibera era approvata anche in occasione della seconda votazione, come previsto dalla normativa vigente, avvenuta il 26 giugno 1907: *Proposte di onoranze a Giuseppe Garibaldi, in occasione del centenario della sua nascita. Seconda deliberazione a termini di legge*, in *Atti del Comune di Milano. Annata 1906-1907*, cit., pp. 522-523.

128 Arisi Rota, *Milano. Garibaldi e l'appropriazione della memoria (1907)*, cit., p. 113.

129 *G.C. Abba a E. Mojana, 18 maggio 1907*, in Archivio Civico del Comune di Milano (d'ora in avanti cit.: ACCMi), Fondo Storico, Affari politici, cart. 1, fasc. 4.

130 Cfr. *G.C. Abba a E. Mojana, 23 maggio 1907*, *ibid*.

131 *R. Bemporad & F.° a E. Mojana, 23 maggio 1907*, *ibid*. Il preventivo variava a seconda del tipo di carta usata, se la stampa era a colori e del numero di copie acquistate.

132 *R. Bemporad & F.° a E. Mojana, 29 maggio 1907*, *ibid*.

Consapevole che il successo delle celebrazioni del centenario della nascita di Garibaldi pensate per le scuole dipendeva ovviamente dal livello di adesione e di collaborazione delle scuole stesse, nell'aprile del 1907 l'assessore alla Pubblica Istruzione si premurava anche di avere il loro parere, predisponendo un questionario da sottoporre alle direzioni didattiche. La maggioranza (quaranta direzioni su sessantatré) esprimeva voto favorevole a partecipare con i propri alunni alla commemorazione pubblica, mentre sedici si dicevano contrarie e motivavano il loro voto o in base a «circostanze speciali delle loro scuole», ovvero lontananza dal centro della città o impossibilità a accompagnare la scolaresca, o a «ragioni di ordine didattico, morale e sociale»[133]. Nella comunicazione inviata all'assessore da parte del Collegio dei direttori didattici non si fornivano ulteriori spiegazioni circa i pareri contrari che consentano di capire se il dissenso sortiva da motivazioni di natura ideologica.

Sembra però più plausibile pensare che le difficoltà individuate da una parte dei dirigenti fossero di carattere didattico. Infatti delle quaranta direzioni che avevano dato il loro assenso, venti si dicevano d'accordo con la proposta che prevedeva la riunione di tutte le classi al Castello e la sfilata al monumento di Garibaldi e le altre venti, pur acconsentendo al programma che, oltre i due momenti già detti, comprendeva l'esecuzione di un canto, in maggioranza affermavano che i loro alunni non avrebbero comunque partecipato al coro. I direttori e le direttrici giustificavano tale rifiuto rilevando che non vi era il tempo necessario per insegnare i canti alle scolaresche e che le prove avrebbero inevitabilmente distratto gli alunni e turbato il calendario scolastico di quel periodo già fitto di scadenze, approssimandosi il termine delle lezioni con gli esami bimestrali e finali.

Vi erano poi anche ragioni di ordine morale alla base dei dubbi, delle astensioni o del dissenso delle direzioni: alcune direttrici avevano infatti manifestato il desiderio che le ragazze non partecipassero alla sfilata. Pur rappresentando una minoranza, come si preoccupava di precisare il Collegio dei direttori all'assessore, è indubbio che questo parere rispecchiava una visione della donna in linea con la tradizione in virtù della quale la visibilità pubblica delle ragazze era considerata sconveniente[134]. Esso documentava anche il persistere dell'idea che donna dovesse essere esclusa dai luoghi destinati all'esercizio del diritto di cittadinanza, che già circa cinquant'anni prima aveva condotto sempre l'amministrazione comunale ambrosiana a non ammettere le

133 *Il Collegio dei Direttori delle scuole elementari di Milano all'assessore alla Pubblica Istruzione, 9 maggio 1907*, *ibid*. Si noti che due direzioni si astenevano dal voto, una affermava di volere consultare i maestri prima di rispondere e altre quattro non avevano fatto pervenire in tempo utile il loro parere.

134 Sul ruolo e sull'immagine della donna fra XIX e XX secolo, ci si limita qui a ricordare: G. Duby, M. Perrot, *Storia delle donne in Occidente. L'Ottocento*, a cura di G. Fraisse, M. Perrot, Roma-Bari, Laterza, 2000; G. Duby, M. Perrot, *Storia delle donne in Occidente. Il Novecento*, a cura di F. Thébaud, Roma-Bari, Laterza, 2001.

alunne delle scuole civiche festive superiori dalla partecipazione alla Festa dello Statuto, cui prendevano parte invece gli studenti maschi delle scuole civiche cittadine[135].

Merita rilevare che anche il Comitato popolare per il centenario garibaldino in quel momento guardava con interesse ai ragazzi degli istituti elementari e secondari, ritenendoli naturali «destinatari del simbolico passaggio del testimone dal Generale e dai suoi veterani alle giovani generazioni». Di qui l'idea di farli partecipare alla celebrazione del centenario vestiti alla garibaldina. Al fine però di evitare che questa iniziativa di «pedagogia patriottica dal basso» perdesse la propria valenza formativa dell'identità nazionale, risolvendosi in una parata folcloristica, e di preservare ai reduci la funzione di trasmissione della memoria, il Comitato abbandonò questa intenzione[136], anche perché, di fatto, come si sta documentando in queste pagine, il Comune si stava già attivando su questo fronte e il Comitato popolare non voleva collaborare con l'amministrazione municipale per questo evento.

Con due circolari inviate alle direzioni didattiche nella prima metà di giugno del 1907, l'assessore alla Pubblica Istruzione definiva tutti i dettagli delle celebrazioni del centenario garibaldino nelle scuole primarie. Erano previsti i seguenti momenti: una conferenza presso ogni scuola a commemorazione del «glorioso Duce», organizzata dalle scuole stesse; la sfilata degli alunni e delle alunne delle classi IV, V e VI al monumento di Garibaldi con la deposizione di una corona di fiori che si sarebbe svolta il giovedì (giorno, come è noto, in cui non vi era lezione) 20 giugno al mattino; la distribuzione del libro di Abba e del numero unico «Il buon amico» rispettivamente agli scolari delle classi V e VI e delle III e IV fissata per il 22 giugno[137].

Meticolosa era la definizione della programmazione e della coreografia del secondo momento, ovvero quello pubblico, che avrebbe fatto incontrare i ragazzi e le ragazze delle scuole milanesi con la cittadinanza per il solenne e unanime ricordo della figura di Garibaldi. I sessantotto istituti primari milanesi erano divisi in tre gruppi o reparti che corrispondevano ai tre colori della bandiera italiana. Ogni gruppo era costituito da scuole maschili e femminili

135 Si rinvia in proposito a C. Ghizzoni, *Building the Nation. Schools and Constitution Day in Milan in the aftermath of Italian Unification*, «History of Education & Children's Literature», vol. X, n. 2, 2015, pp. 23-45. Più in generale sul tema dell'esclusione della donna dai luoghi e dagli eventi connessi all'esercizio della cittadinanza si veda: I. Porciani, *La festa della nazione. Rappresentazione dello Stato e spazi sociali nell'Italia Unita*, Bologna, il Mulino, 1997, pp. 88-95.

136 Arisi Rota, *Milano. Garibaldi e l'appropriazione della memoria (1907)*, cit., p. 118. Di lì a due anni, in occasione del cinquantesimo delle celebrazioni del 1859, furono coinvolte ancora le scuole, ma in questa occasione da parte democratica e socialista vi furono reazioni polemiche in quanto gli scolari avrebbero dovuto sfilare davanti ai monumenti non solo dei padri della patria, ma anche di Napoleone III: M. Baioni, *Memorie e usi pubblici nell'Italia contemporanea*, Reggio Emilia, Diabasis, 2009, pp. 162-163.

137 *L'assessore alla Pubblica Istruzione alle Direzioni delle Scuole elementari maschili e femminili, 12 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

che marcivano divisi in quattro colonne, con alla testa la bandiera, gli stendardi del proprio colore e, eventualmente, i tamburi. Ogni gruppo doveva fare il suo ingresso nel cortile del Castello Sforzesco da porte differenti, sotto la sorveglianza di un direttore. Alle 8 aveva inizio la sfilata del corteo in uscita dal Castello verso Largo Cairoli:

giungendo davanti al Monumento – precisava la circolare – gli alfieri saluteranno abbassando la bandiera, i capi squadra (che si dovranno trovare alla testa e a sinistra della propria squadra) daranno 'l'Attenti a destr!'. Le squadre saluteranno continuando la marcia.

Il corteo sarebbe poi proseguito all'interno del Parco del Castello sempre sotto la vigile sorveglianza dei direttori[138].

La documentazione coeva ci rivela il successo e la riuscita della giornata, seguita dai milanesi e dalle autorità comunali. Per il tramite dell'assessore Mojana, la Giunta ringraziava il corpo docente per l'impegno profuso nella preparazione degli alunni e delle alunne e plaudiva questi ultimi per la «disciplina» di cui avevano dato prova, «sfilando con disinvolta precisione di movimenti e con inappuntabile contegno innanzi al monumento dell'Eroe», frutto certamente «di un'azione educatrice, che si [svolgeva] continua, ogni giorno, nella scuola»[139].

Analoghi apprezzamenti erano espressi dalla stampa. Il «Corriere della Sera» elogiava la modalità di celebrazione individuata dal Comune, in quanto aveva consentito a ben 12.000 alunni di partecipare tutti insieme alle onoranze a Garibaldi[140]. La folla presente era stata favorevolmente colpita dalla «compostezza» degli scolari, dall'ordine con cui si era svolta la sfilata, scandita dal suono delle bande e dall'esecuzione di canti patriottici, e dagli effetti scenografici.

Il corteo – precisava il quotidiano milanese – presentava un magnifico effetto: i costumi delle scolaresche, i berretti uniformi, le bandiere, gli stendardini, formavano un insieme vivacissimo e bizzarro di colori. […]. Via via che il corteo […] passava davanti al monumento di piazza Cairoli, i capi-gruppo ordinavano l'*attenti* e mentre i vessilliferi abbassavano l'asta, gli alunni volgevano il capo fissando collo sguardo il monumento in segno di saluto[141].

138 *L'assessore alla Pubblica Istruzione alle Direzioni delle Scuole elementari maschili e femminili, 15 giugno 1907*, *ibid*.

139 *L'assessore alla Pubblica Istruzione alle Direzioni delle Scuole elementari maschili e femminili, 22 giugno 1907*, *ibid*.

140 Gli scolari, maschi e femmine, iscritti a tutte le classi delle scuole primarie e del corso popolare nell'anno scolastico 1906-1907 ammontavano a 48.732: Comune di Milano, *Dati statistici a corredo del resoconto dell'amministrazione comunale 1910*, Milano, G. Civelli, 1911, pp. 346-347.

141 *La sfilata di 12.000 alunni davanti al monumento di Garibaldi*, «Corriere della Sera», 21 giugno 1907, p. 4. Cfr. altresì: *Sfilata di alunni delle scuole elementari davanti al monumento di Garibaldi*, *ibid*., 20 giugno 1907, p. 4. «L'Illustrazione Italiana» dedicò un intero fascicolo, quello del 30 giugno del 1907, alla celebrazione del centenario garibaldino e, tra le immagini pubblicate, vi è anche una fotografia della sfilata delle scuole milanesi, che è riprodotta in questa sede alla fine

L'organizzazione dell'evento suggerisce alcune riflessioni. Innanzi tutto si può sottolineare che il compito di presiedere ai diversi momenti della mattinata (dal ritrovo in Castello fino alla sfilata) era demandato solo ai direttori maschi. Alle ventotto direttrici in servizio in quell'anno (a fronte di trentadue direttori) non era riconosciuta alcuna visibilità pubblica del lavoro preparatorio, comunque svolto per quella iniziativa nelle scuole femminili[142]. La mancata valorizzazione delle dirigenti in incarichi di coordinamento di questa festa civile documenta ulteriormente quanto detto prima a proposito delle riserve circa la partecipazione delle ragazze alla sfilata e, in generale, circa l'accesso delle donne all'esercizio della cittadinanza.

Merita poi rilevare che il corteo in occasione del centenario garibaldino si inseriva in una tradizione di coinvolgimento attivo, e non solo da spettatori passivi, degli alunni delle scuole comunali ambrosiane nelle feste civili, quali quella dello Statuto, cui già si è fatto cenno[143]. Tale coinvolgimento era sicuramente lontano dai toni e dalle forme che, più tardi, la mobilitazione dei più giovani da parte delle istituzioni avrebbe assunto, sia pure per il momento in modo provvisorio e eccezionale, durante la Grande guerra e in virtù della quale l'infanzia sarebbe passata dall'esclusione dalla vita civile all'inclusione[144], ciononostante esso documenta che la scuola italiana – o almeno una parte di essa – non era estranea a forme di partecipazione attiva alla formazione dell'identità nazionale, non semplicemente trasmessa in aula tramite i libri.

Quale fosse l'immagine di Garibaldi veicolata in preparazione di quella occasione agli studenti milanesi e da loro recepita emerge in modo più nitido da due altre fonti, ovvero dal già citato numero unico del giornale «Il buon amico» distribuito ai ragazzi delle classi III e IV elementari e dalle lettere di ringraziamento che alunni e alunne inviarono alla Giunta municipale per avere ricevuto in dono la *Storia dei mille narrata ai giovinetti* di Abba. «Il buon amico» era diretto da Anna Vertua Gentile, nota e prolifica autrice di libri per fanciulle[145], e era composto di otto pagine. Conteneva articoli, in parte scritti da insegnanti delle scuole ambrosiane, riguardanti gli eventi più significativi della vita di Garibaldi

dell'articolo. La data indicata dal periodico – il 22 giugno – è verosimilmente sbagliata in quanto, come visto nel saggio, la cerimonia in questione si tenne il 20 giugno del 1907: cfr. l'immagine n. 1 alla fine del testo.

142 I dati relativi al personale direttivo sono tratti da: Comune di Milano, *Dati statistici a corredo del resoconto dell'amministrazione comunale 1910*, cit., p. 349.

143 Oltre all'articolo già ricordato (Ghizzoni, *Building the Nation. Schools and Constitution Day in Milan in the aftermath of Italian Unification*, cit.) si rinvia anche a Ead., *Scuola e lavoro a Milano fra Unità e fascismo. Le civiche Scuole serali e festive superiori (1861-1926)*, Lecce-Rovato (BS), Pensa Multimedia, 2014, pp. 40-51.

144 Cfr. A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005, in specie su questi concetti pp. 190-192.

145 Su A. Vertua Gentile si vedano le voci biografiche in E. Codignola (ed.), *Pedagogisti ed educatori*, Milano, Istituto Editoriale Italiano Carlo Tosi, 1939, p. 432; R. Farina (ed.), *Dizionario biografico delle donne lombarde 568-1968*, Milano, Baldini & Castoldi, 1995, pp. 1124-1126; Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione 1800-2000*, Vol. II, pp. 640-641.

e che ricalcavano i temi e i canoni narrativi propri delle biografie, cui già si è fatto cenno. Il fascicolo si apriva con un contributo sulla sua fanciullezza. Di questo periodo, come è risaputo la parte meno nota e documentata della sua esistenza, si ricordavano i fatti contenuti in tutte le narrazioni simili, dall'amore per la madre – donna modesta, pia e caritatevole alla quale, secondo lo stesso Garibaldi, si doveva la sua sensibilità per le sofferenze dei più deboli – agli atti di bontà compiuti da bambino, dalla passione per il mare agli studi condotti con precettori fino all'addestramento alla vita marinara[146]. Il fine pedagogico-morale dell'articolo era esplicitato dalla conclusione che così recitava: «E voi, cari ragazzi, leggendo di Garibaldi fanciullo imparate da lui la fermezza del carattere, l'energia del volere, la saldezza dei propositi e insieme procurate di acquistare la bontà dell'animo, la gentilezza dei sentimenti, la pietà per tutti quelli che soffrono»[147].

Ancora l'infanzia era protagonista e destinataria del messaggio educativo del secondo articolo, dal titolo *Diavoletti garibaldini*. La voce narrante è quella di un'adulta, la zia di Raffaele il quale, intento nello studio del Risorgimento, apprendeva con stupore e eccitazione che, in occasione della difesa di Roma nel 1849, fra i volontari che componevano la legione comandata dal nizzardo vi erano anche dei suoi coetanei, ovvero adolescenti fra i dodici e i quindici anni. Dopo avere illustrato e elogiato le audaci imprese di questi giovanissimi, la zia chiudeva il racconto ricordando però a Raffaele, che rimpiangeva di non essere nato in quei tempi per potere anch'egli diventare un eroe, e per il suo tramite a tutti i piccoli lettori, che essi erano chiamati a dimostrare il loro eroismo in altre «difficili, sante battaglie nelle quali non si [spargeva] sangue»[148]. Da notare che in questo breve testo faceva capolino quella nuova immagine di infanzia il cui desiderio di azione e di partecipazione alla vita civile era destinato, a cominciare proprio da quel primo decennio del Novecento, a attirare l'attenzione del mondo adulto e delle istituzioni che vedevano in questa ansia di protagonismo «un investimento positivo», da mobilitare a sostegno della causa nazionale[149].

Agli eventi centrali della storia d'Italia dal 1859 al 1866 (la spedizione dei Mille, la Terza guerra di Indipendenza) così come della vita di Garibaldi, nonché a momenti importanti, ma anche dolorosi, della storia umana dell'Eroe (la morte di Anita) sono dedicati altri articoli che compongono il giornale, tutti legati da un unico obiettivo: spiegare ai ragazzi il contributo dato dal nizzardo alla causa nazionale, sottolinearne a più riprese l'incondizionata dedizione alla patria fino al sacrificio della sua volontà e dei suoi affetti[150]. In questi articoli, come in

146 A.C., *La fanciullezza di Garibaldi*, «Il buon amico», 23 giugno 1907, pp. 1-2.
147 *Ibid*., p. 2.
148 A. Ferraresi, *Diavoletti garibaldini*, *ibid*., p. 3.
149 Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, cit., p. 6.
150 F. Anelli, *Momenti solenni e tragici della vita di Garibaldi*, «Il buon amico», 23 giugno 1907, p. 3; G. Cavallari Cantalamessa, *Calatafimi*, *ibid*., p. 4 (si tratta di una poesia); F. Mensi, *Garibaldi a Caprera*, *ibid*., p. 5; E. Duchini, «*Obbedisco*», *ibid*., pp. 6-7.

quelli relativi alla sua figura di condottiero e alla sua morte[151], si trametteva agli scolari milanesi un modello di eroicità e di valori morali da emulare nella vita quotidiana (sobrietà, generosità, amore per la vita pacifica e ricorso alla guerra e alla violenza solo in nome di un bene superiore). «Il buon amico» riproduceva cioè, e non poteva essere altrimenti, l'immagine che dalla sua morte in poi, soprattutto per opera della Sinistra storica e in specie di Crispi, ci si era sforzati di diffondere proprio tramite la scuola. Come si è visto nelle pagine precedenti a proposito delle biografie in circolazione fra i maestri e delle riviste didattiche, il Garibaldi commemorato dagli alunni del capoluogo lombardo nel 1907 era cioè un eroe depurato dei tratti distintivi, destinati a dividere; egli era «un mito di mobilitazione nazionale» che doveva unire gli italiani[152].

4. *«Pur avendo il cuore pieno di riconoscenza, la mente non mi detta che miseri pensieri»*[153]

Ultimo momento del programma delle celebrazioni del centenario fu la distribuzione agli alunni e alle alunne delle classi V e VI di una copia del libro *Storia dei mille narrata ai giovinetti* di Abba, al quale già si è fatto riferimento nelle pagine precedenti. Alcune scuole espressero il loro ringraziamento all'amministrazione municipale per il dono tramite lettere scritte dagli studenti. Nello specifico sono state reperite nell'Archivio del Comune di Milano 58 missive redatte da tre classi della scuola elementare maschile di via Sant'Orsola e da due di quella femminile di Via Rasori[154]. Mentre ognuna delle tre classi maschili (due V e una VI) recapitò all'assessore un'unica lettera, firmata da tutti gli scolari, le classi femminili (una V e una VI) inviarono lettere distinte per ogni alunna.

Prima di procedere nella presentazione sintetica dei contenuti, occorre tenere presente che queste lettere, come altre scritture scolastiche, non sono espressione della soggettività infantile, quanto piuttosto di una rielaborazione personale, comunque mediata dai codici linguistici del mondo adulto, dei contenuti trasmessi a scuola[155]. Alcuni studiosi, d'altra parte, hanno concordato sulla

151 C. Calderini, *L'eroico condottiero*, *ibid.*, pp. 5-6; A. Riva, *Passa Garibaldi*, *ibid.*, p. 7; A. Guérin, *Al largo Cairoli*, *ibid.*, p. 7; Dioneo, *Quando Garibaldi morì*, *ibid.*, p. 8; A. de Mohr, *Memorie di giorni lontani*, *ibid.*, p. 8 (si tratta di una poesia).

152 Possieri, *Garibaldi*, cit., p. 38.

153 *I.G. all'assessore alla Pubblica istruzione del Comune di Milano, 26 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

154 Si precisa che le lettere scritte da alunni e alunne sono 57, in quanto una è scritta dalla direttrice di Via Rasori. Esse sono collocate in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

155 Sul tema delle scritture infantili, sul loro grado di spontaneità si rinvia al numero monografico dal titolo *La scrittura bambina*, «Materiali di lavoro», n. 2-3, 1992; Q. Antonelli, E. Becchi (edd.), *Scritture bambine. Testi infantili tra passato e presente*, Roma-Bari, Laterza, 1995.

opportunità di superare la giustapposizione fra scrittura disciplinata e scrittura spontanea per addivenire, sul piano della metodologia della ricerca storica, a categorie interpretative diverse di questa particolare fonte[156]. Secondo Montino si deve usare insieme alla categoria di scrittura disciplinata, quella di scrittura personale che «reinterpreta, rompe degli schemi e degli stereotipi, utilizza il materiale linguistico e retorico così come le idee e i valori forniti dalla scuola e dagli adulti in maniera creativa»[157]. Dal canto suo Gibelli propone che si contrapponga «attività» a «passività». Il primo concetto prevede comunque che vi sia «la pressione del condizionamento», però non semplicemente subita e che può tradursi in «una risposta attiva: consistente di volta in volta nell'aperto rifiuto (ma è un caso limite) e molto più frequentemente nella rielaborazione, nell'uso improprio, imperfetto, pieno di inadeguatezze e scarti rispetto al modello»[158].

Meda, a sua volta, rileva che l'attenzione dello studioso di storia dell'educazione deve essere spostata dal risultato del processo di apprendimento (la padronanza della scrittura) al «percorso formativo» di questa abilità e suggerisce di valorizzare le stereotipie, la ripetitività, la retorica, che connotano le scritture scolastiche e che disincentivano il loro uso da parte della ricerca storica, come indicatori della diffusione di talune pratiche didattiche[159].

Queste avvertenze sono tanto più cogenti per l'analisi degli scritti degli scolari milanesi, in quanto la composizione di missive rappresentava un esercizio previsto dai programmi per le elementari, ancora agli inizi del Novecento, quale strumento per insegnare a scrivere correttamente, ma anche per trasmettere norme comportamentali e valori da assimilare. Tale insegnamento si avvaleva di formulari epistolografici, molto diffusi nella scuola del tempo, che offrivano a maestri e allievi «modelli esemplari» cui attingere o meglio adeguarsi[160].

156 Si vedano in tal senso le considerazioni svolte a proposito delle scritture scolastiche – e dunque della specifica fonte qui considerata – in R. Sani, *Bilancio della ricerca sui quaderni scolastici in Italia*, in J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España: balance y prespectivas*, Macerata, eum, 2013, pp. 83-103.

157 D. Montino, *Da scolari a bambini? Scritture disciplinate e scritture personali nei quaderni di scuola*, in J. Meda, D. Montino, R. Sani (edd.), *School exercise books. A Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, Firenze, Polistampa, 2010, Vol. II, pp. 1289-1303 (la citazione è a p. 1301); ma si veda anche: Id., *Bambini, penna e calamaio. Esempi di scritture infantili e scolastiche in età contemporanea*, Roma, Aracne, 2007.

158 A. Gibelli, *Bambini e bambine alle prese con la scrittura: uno sguardo storico sul secolo XX*, «History of Education & Children's Literature», vol. VII, n. 1, 2012, pp. 183-199 (la citazione a p. 195).

159 Cfr. J. Meda, *Scritture scolastiche: contributo alla definizione d'una categoria storiografica*, in G. Raimondi, H. Champvillair (edd.), *Il CoDiSV in classe. Proposte metodologiche e didattiche di ricerca applicata*, Roma, Aracne, 2015, pp. 25-41 (la citazione a p. 45).

160 Di qui la diffusione nella scuola del tempo di formulari epistolografici presi in esame dall'ampia ricerca di F. Targhetta, «*Signor maestro onorandissimo*». *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, Torino, SEI, 2013.

Nello specifico la fonte qui utilizzata è costituita da lettere scritte da ragazzi a un'autorità (l'assessore comunale alla Pubblica istruzione) e quindi lo stile linguistico riflette inevitabilmente il dislivello non solo generazionale, ma anche di status. In queste, come in altre missive dello stesso tipo, l'enfasi da parte del mittente è posta non tanto su ciò che si è appreso, quanto piuttosto sull'atto stesso di conformarsi al messaggio educativo veicolato in classe.

Dunque, sia pure con tutti i limiti e le precisazioni cui si è fatto cenno, le lettere reperite ci consentono di cogliere non solo i contenuti trasmessi a scuola su Garibaldi e sul centenario della sua nascita, ma anche ciò che era recepito dagli alunni, cercando così di dare una risposta al nodo storiografico rilevato dagli studiosi a proposito della carenza di ricerche circa la ricezione «che gli sforzi della pedagogia politica volti a modellare l'identità nazionale raccolsero in seno alla società nazionale»[161].

Le tre lettere redatte dalle classi maschili presentano analogie nei contenuti e nello stile, tanto che si può affermare che sembrano rinviare a uno stesso schema sicuramente proposto dai maestri. Il primo dato che emerge fin dall'*incipit* è la deferenza nei confronti dell'autorità municipale cui ci si rivolge «con animo commosso e riconoscente»[162] per il dono ricevuto. In tutte e tre le lettere non si entra nel merito del libro in sé, in quanto appena avuto; esso è ritenuto un'occasione per «richiamare sempre alla memoria […] le lezioni dei […] maestri […] intorno al Grande che [aveva infiammato] l'Italia alla riscossa»[163] e che dai ragazzi era riconosciuto come «esempio nell'amore alla patria, al dovere, all'onestà»[164]. Contestualmente, l'opera di Abba costituiva per questi studenti il ricordo del «pensiero gentile della Rappresentanza Comunale»[165] che aveva voluto fare loro questo regalo e deporre a loro nome «ai piedi del Monumento di Lui, il fiore dell'amore e della riconoscenza». La gratitudine a Garibaldi si univa dunque a quella per gli amministratori perché li avevano coinvolti nella celebrazione e, anzi, nelle loro parole questi due esempi «di gentilezza e generosità» si fondevano nel motivarli a crescere «degni dell'Uomo forte e buono, della […] carissima Milano, d'Italia tutta»[166]. Insomma si può

161 Baioni, *Memorie e usi pubblici nell'Italia contemporanea*, cit., p. 27, che rileva altresì: «quale fu la fruizione dei miti, come furono recepiti presso le diverse componenti della società, quali mutamenti intervennero col passare degli anni? Sono solamente alcuni dei quesiti che si impongono qualora si voglia formulare un'interpretazione che punti a oltrepassare la sfera delle intenzioni e dei propositi».

162 *Gli alunni della classe V B della scuola elementare maschile di via Sant'Orsola alla Giunta municipale*, *22 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

163 *Gli alunni della classe VI della scuola elementare maschile di via Sant'Orsola alla Giunta municipale*, *22 giugno 1907*, *ibid*.

164 *Gli alunni della classe V B della scuola elementare maschile di via Sant'Orsola alla Giunta municipale*, *22 giugno 1907*, cit. È da rilevare che definizioni più o meno simili ritornano nelle altre due lettere delle classi maschili.

165 L'espressione si trova nelle lettere scritte sia dalla V A che dalla VI della scuola di via Sant'Orsola.

166 *Gli alunni della classe VI della scuola elementare maschile di via Sant'Orsola alla Giunta*

dire che la partecipazione agli eventi organizzati dal Comune per il centenario sicuramente era riuscita a rinforzare negli scolari milanesi la consapevolezza del contributo di Garibaldi alle vicende dell'epopea risorgimentale. Tuttavia si deve anche dire che, secondo quanto emerge dalle lettere, tale consapevolezza era da loro percepita come esito dell'impegno del Comune: identità nazionale e identità locale erano strettamente connesse e la seconda alimentava la prima[167].

Anche all'interno del gruppo di lettere decisamente più consistente scritto da mano femminile si individuano analogie e ripetizioni di temi e concetti, anche rispetto a quelle maschili. Molte delle missive seguono uno schema identico, verosimilmente suggerito anche in questo caso dalle maestre in classe. Va però detto che, proprio in virtù dell'ampiezza del campione, si possono distinguere alcune lettere connotate da una maggiore originalità, frutto dunque – per usare la categoria interpretativa prima richiamata – del lavoro di alunne che più delle altre avevano assimilato in modo personale i suggerimenti e i modelli prospettati in aula.

Il titolo di questo paragrafo è tratto proprio da una di queste missive e documenta uno dei temi più frequenti in queste lettere di ringraziamento: l'atteggiamento deferente nei confronti del destinatario, l'assessore alla Pubblica Istruzione, che rappresentava l'autorità con cui ci si relazionava con soggezione, nel timore di arrecare disturbo, e con la convinzione di non essere all'altezza. Di tale atteggiamento sono testimonianza il lessico usato e le formule adottate – che tendono a ripetersi – negli *incipit*. Così, se nella lettera citata nel titolo del paragrafo una ragazza della classe VI esprimeva l'inadeguatezza sua e del suo «povero scritto» che aveva la «pretesa» di rivolgersi a Mojana[168], un'altra alunna della stessa classe affermava di non trovare «parole bastanti» per esprimere la propria gratitudine[169].

Tale deferenza, come già nelle lettere maschili, era anche la spia del sentimento prevalente in questo campione di lettere, ovvero la riconoscenza nei confronti della municipalità per il dono del libro di Abba e per avere consentito la partecipazione alle celebrazioni pubbliche per il centenario di Garibaldi. In alcuni casi l'espressione del senso di gratitudine costituiva l'unico tema dello scritto che taceva sull'evento che aveva offerto l'occasione per quel carteggio, ovvero il coinvolgimento delle scolaresche nelle commemorazioni del nizzardo.

Nelle lettere femminili, rispetto a quelle maschili, l'attestazione di gratitudine è anche più insistita, confermando così una tendenza rilevata nell'analisi dei

municipale, *22 giugno 1907*, cit.

167 Si vedano le riflessioni formulate in merito alla dinamica «nazionale/locale» nella costruzione dell'identità nazionale da Baioni in *Memorie e usi pubblici nell'Italia contemporanea*, cit., pp. 22-23, 43-46.

168 *I.G. all'assessore alla Pubblica istruzione del Comune di Milano, 26 giugno 1907*, cit.

169 *P.F. all'assessore alla Pubblica istruzione del Comune di Milano, 26 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

«modelli esemplari» per ragazze pubblicati negli epistolari[170]. Il dono del libro era quasi unanimemente considerato un segno tangibile della cura prestata dall'amministrazione municipale – ovvero i «Superiori» – per l'educazione dei giovani. Quell'atto era considerato una «prova d'affetto»[171] da una studentessa e un'altra ancora, rivolgendosi all'assessore, notava:

> Leggerò il volume dell'Abba con piacere perché il libro mi è stato regalato non dai miei parenti, ai quali sono legata da vincoli d'affetto, ma da Lei che, pur non conoscendoci, mi ama sapendoci della patria di quell'Eroe al quale si fa tanta festa[172].

Il regalo ricevuto, scriveva un'altra alunna di V, avrebbe rappresentato il ricordo dei «primi anni di scuola» unito indissolubilmente al «pensiero riconoscente a tutti quelli che [l'avevano] aiutata a [rendersi] migliore»[173]. Tale pensiero spingeva addirittura alcune di loro a fare voti affinché l'assessore avesse per l'avvenire «alieve [sic!] buone, tutte brave e che [sapessero] apprezzarla, amarla, ed esserle riconoscenti così come» lo sarebbero state sempre loro[174].

Queste missive documentano come, ancora a inizi Novecento, permanesse la convinzione che l'istruzione fosse un privilegio, un bene concesso, in questo caso dal Comune, ai ceti popolari, e come essa non fosse ancora del tutto percepita come un bene garantito come gratuito e obbligatorio dalla Legge Casati in poi[175]. Merita segnalare infine che alcune lettere delle alunne di sesta, insieme alla gratitudine, manifestavano un sentimento più personale, ovvero il profondo dispiacere perché per loro quello era l'ultimo anno di scuola, che lasciavano «con un vero schianto al cuore»[176].

Va detto che in molte lettere, come già in quelle dei maschi, queste attestazioni di riconoscenza nei confronti dell'amministrazione si sommavano alla

170 Si vedano in merito le riflessioni di Targhetta, «*Signor maestro onorandissimo*». *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, cit., pp. 33-39 e pp. 92-98: egli segnala che la scrittura rappresentava negli epistolari, fino ai primi del Novecento, un'attività prevalentemente maschile e che gli esempi di missive destinate alle fanciulle le raffiguravano come schive, operose, remissive, pronte a chiedere scusa per le loro inevitabili mancanze.

171 *G.N. all'assessore alla Pubblica istruzione del Comune di Milano, 26 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

172 *C.B. all'assessore alla Pubblica istruzione del Comune di Milano, 25 giugno 1907*, *ibid*.

173 *R.B. all'assessore alla Pubblica istruzione del Comune di Milano, 24 giugno 1907*, *ibid*.

174 *I.B. all'assessore alla Pubblica istruzione del Comune di Milano, 24 giugno 1907*, *ibid*. Merita rilevare che i refusi presenti in questa raccolta di lettere sono rarissimi, a ulteriore conferma del controllo ovviamente esercitato dagli insegnanti su questo tipo di scrittura scolastica.

175 Rinvio, in merito, alle osservazioni formulate a proposito dell'insegnamento impartito nelle civiche Scuole serali e festive di Milano tra Unità e età giolittiana: Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo. Le civiche Scuole serali e festive superiori (1861-1926)*, cit., pp. 49-50. Targhetta nota che questa percezione dell'istruzione si rileva anche nei modelli esemplari di lettere pubblicati e diffusi nella seconda metà dell'Ottocento: «*Signor maestro onorandissimo*». *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, cit., p. 54.

176 *P.M. all'assessore alla Pubblica istruzione del Comune di Milano, 26 giugno 1907*, in ACCMi, Fondo Storico, Affari politici, cart. 1, fasc. 4.

gratitudine per Garibaldi, la cui dedizione alla causa della patria, il cui eroismo e i sacrifici compiuti spronavano le ragazze a promettere di crescere degne dei valori che egli impersonava. È interessante notare come alcune di queste alunne, sicuramente sollecitate in tal senso dalle insegnanti, individuassero il loro contributo di donne italiane alla causa nazionale, nell'essere donne forti e brave madri che a loro volta avrebbero trasmesso ai figli le gesta del nizzardo. Scriveva I.C., alunna di V:

> Questo bel volume lo terrò con cura e quando avrò anch'io dei figli lo rileggerò e racconterò loro di Giuseppe Garibaldi, di quel grande Eroe che fece la nostra Italia libera, unita, indipendente. Quando avrò dei dispiaceri consulterò quel libro e da quelle pagine mi ritornerà il coraggio[177].

Come si è anticipato, all'interno di questo campione spiccano alcune missive che documentano una maggiore autonomia nella rielaborazione del modello di lettera da mandare all'assessore, sicuramente illustrato dalle maestre in classe, come è dimostrato dalle ripetizioni di frasi, temi e concetti. Alcune alunne, infatti, riservavano meno spazio alla manifestazione dei sensi di gratitudine e dedicavano maggiore attenzione al centenario di Garibaldi, alla storia dell'eroe del Risorgimento, alla partecipazione alla sfilata, dicendosi onorate di avere potuto prendere parte a quell'evento pubblico. Questi scritti appaiono l'esito di una acquisizione più personale dei contenuti appresi a scuola.

Ad esempio, la lettera di A.B. di V non ricalca la struttura delle altre, in quanto ella narra le emozioni provate nel ricevere e nel leggere il libro. La costruzione dei periodi appare un po' difficoltosa e vi sono ripetizioni di termini, a testimonianza della riformulazione autonoma degli insegnamenti avuti. Ella scriveva:

> Ieri la nostra buona Signora maestra ci distribuì il bellissimo libro intitolato alla grande storia del nostro eroe. Quando l'ebbi nelle mani una grande contentezza s'impadronì di me e voltando le pagine mi veniva una grande contentezza di sapere quanto contenesse e il mio cuore sussultava nel vedere il nostro eroe accompagnato da molti valorosi, che furono sempre pronti per rendere libera ed indipendente la nostra bella patria[178].

In un'altra lettera ancora, il contributo personale dell'alunna emerge dall'attenzione prestata al libro in sé, alle immagini e alla stampa. Questa ragazzina di VI osservava:

> Noi non ci aspettavamo un dono così prezioso, e non ci parve vero che proprio a ciascuna di noi fanciulle fosse destinato uno di quei volumi eleganti dalla stampa nitida e dalle incisioni bellissime. Oh l'ardore di quelle 'Camicie Rosse' sfolgoranti sul frontespizio come altrettante fiamme![179]

177 *P.M. all'assessore alla Pubblica istruzione del Comune di Milano, 25 giugno 1907*, *ibid*.
178 *A.B. all'assessore alla Pubblica istruzione del Comune di Milano, 24 giugno 1907*, *ibid*.
179 *I.M. all'assessore alla Pubblica istruzione del Comune di Milano, 25 giugno 1907*, *ibid*.

Conclusioni

I brevi stralci riprodotti documentano che anche queste lettere, molto formali, come si è visto, in quanto espressione di una comunicazione asimmetrica, lasciano comunque scorgere sprazzi di soggettività. Esse ci informano che questi scolari milanesi di inizio Novecento avevano ben assimilato le notizie fondamentali da apprendere, secondo i programmi didattici, sulla figura dell'Eroe dei due mondi. La loro partecipazione alla celebrazione del centenario della nascita del nizzardo non sembra aggiungere ulteriori cognizioni in merito alla storia del Risorgimento italiano. Ciò che colpisce quegli alunni e quelle alunne dell'esperienza è il fatto di potere essere parte attiva di quegli eventi, dalla sfilata alla distribuzione del libro, in quanto rappresentavano momenti non consueti nella quotidianità della vita scolastica e nella vita dell'infanzia di inizio XX secolo.

Va tuttavia notato che ciò che emerge in merito a questa partecipazione dalla documentazione citata, relativa alla preparazione della celebrazione e alla sua narrazione, fatta dagli stessi alunni o dalla stampa dell'epoca, è l'aspetto coreografico di cui i ragazzi con gli stendardi, le bandiere, il passo ritmato e cadenzato della marcia sono i protagonisti. Garibaldi, quasi, sta sullo sfondo. Il ricordo del centenario della sua nascita da parte dalle scolaresche milanesi assume la connotazione di una festa nazionale in cui la figura dell'eroe del Risorgimento, che ne è l'occasione, appare sfumata; egli ha perso le sembianze dell'«eroe dinamico», di cui si ritrova invece traccia nell'epopea raccontata nelle pagine delle riviste didattiche o nelle biografie suggerite ai maestri, e ha assunto quelle di «eroe di pietra»[180]. Non a caso nella lunga e dettagliata circolare del Comune di programmazione delle onoranze del giugno del 1907 egli è evocato solo quando i ragazzi sono invitati a dirigere un saluto al suo monumento, sollecitandoli però a fare molta attenzione a non sostare troppo «per non incagliare lo svolgersi del corteo»[181].

Il timore che si coglie nella circolare comunale conferma infine quanto rilevato dagli studiosi a proposito della liturgia patriottica in età liberale, segnata dalla paura della folla e connotata da un cerimoniale commemorativo rivolto al passato, in cui prevalevano sentimenti di «mestizia» per l'Eroe perduto, tanto più evidenti se confrontati con il vitalismo del culto dei caduti della Grande guerra e, in seguito, dei martiri della rivoluzione fascista[182]. Se però è indubbia la prudenza dell'amministrazione comunale, è anche vero, come già detto, che quell'evento assunse per quei ragazzi milanesi la forma di un inusuale «esercizio

180 Possieri, *Garibaldi*, cit., pp. 38-39.

181 *L'assessore alla Pubblica Istruzione alle Direzioni delle Scuole elementari maschili e femminili, 15 giugno 1907*, cit.

182 E. Gentile, *Il culto del littorio. La sacralizzazione della politica nell'Italia fascista*, Roma-Bari, Laterza, 1998, p. 22, ma si veda anche il capitolo quarto sulla *Liturgia dell'«armonico collettivo»*.

attivo» di pedagogia patriottica, vissuto all'interno di una scuola di fatto tutta fondata su una didattica e su una metodologia passive[183].

La sfilata degli alunni delle scuole davanti al monumento di Garibaldi in Milano — 22 giugno (fot. Treves).

Pic. 1

183 Sono da tenere presenti anche le osservazioni di Baioni il quale ritiene necessari studi condotti a livello locale volti a sondare le modalità in cui si esplicò la pedagogia patriottica in età liberale, evitando operazioni di decontestualizzazione e cercando di fare emergere le reazioni e le mobilitazioni che essa riuscì a promuovere: *Memorie e usi pubblici nell'Italia contemporanea*, cit., p. 165. Più in generale, sulla «estetica della politica» affermatasi in Italia durante il processo di Unificazione nazionale, si veda Banti, Ginsborg (edd.), *Il Risorgimento*, cit.

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Male and female teachers between real and ideal. The literary-historical representation of three novels by De Amicis

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ABSTRACT: Edmondo De Amicis offers a detailed depiction of Italian schools at the end of the XIX Century. In his most works, from *Cuore* to *Il romanzo di un maestro* and *Primo maggio*, the author focuses on real and ideal issues related to teachers' working and personal conditions. The present paper explores the different approaches on male and female teaching showed by the author. The works demonstrate to be a fundamental literary and historical source as they give both an idyllic and truthful vision of the education system in post-unity Italy, offering different, interrelated perspectives on teachers' portrayals.

EET/TEE KEYWORDS: Teachers; Children's Literature; History of Education; De Amicis, Italy; XIXth Century.

1. *Italian schools at the end of the Nineteenth Century: a brief historical introduction*

Several studies have examined the wide topic of schooling in post-unification Italy[1], underlining the precarious conditions in which the education system

[1] Cfr. C. Covato, A.M. Sorge (edd.), *L'istruzione normale dalla legge Casati all'età giolittiana*, Roma, Ministero per i Beni Culturali e Ambientali, Ufficio Centrale per i beni archivistici, 1994; E. Becchi, *I bambini nella storia*, Bari, Laterza, 1994; C. Covato, S. Ulivieri (edd.), *Itinerari nella storia dell'infanzia. Bambine e bambini, modelli pedagogici e stili educativi*, Milano, Edizioni Unicopli, 2001; A. Santoni Rugiu, *Maestre e maestri. La difficile storia degli insegnanti elementari*, Roma, Carocci, 2006; S. Ulivieri, *La scuola in mano alle donne! 'La femminilizzazione' dell'insegnamento in Italia tra conformismo educativo e pedagogia della differenza*, «Pedagogia e Vita», vol. 2, 2018; A. Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione*

operated. At the end of the Nineteenth Century, Italian schools were backward from several points of view. First of all, teaching environments and their furnishings were poorly regulated; teaching materials were inadequate and the number of students was extremely high[2]. Secondly, in these years the salary of a teacher was lower than the salary of a specialized worker or public employee, clearly demonstrating that education was not given serious consideration. The economic conditions of some teachers were so precarious that in some cases they had to find more than a job to survive. Moreover, elementary school is organized by public administration and municipalities: the school system is approached with sufficiency and no money are invested. In addition to all this, there was a significant number of conflicts with the pupils' families, mostly as a result of the low esteem given to the figure of the teacher[3]. Despite the positive disposition of teachers, a reform project seemed to be extremely challenging. In this regard, in spite of the liberal government's intention to make the school a non-religious institution, many priests taught in elementary schools to cover the shortage of teachers caused by their poor living conditions[4].

Furthermore, we should consider the issue of teachers' training: in smaller, decentralised countries, access to work in primary schools was also allowed to people without a specific licence, as long as they were assessed to be able to carry out this task by a school inspector. In fact, in 1872, 21% of teachers were working with a provisional permission[5]. As a consequence, these teachers were not necessarily qualified and trained: although on several occasions an attempt have been made to broaden their knowledge through 'Pedagogical Conferences', the results turned out to be very modest according to the judgements of the inspectors[6]. In spite of the frequent difficulties, the figure of the teacher remained a fundamental reference point, especially in the countryside, where children are not educated and followed by their families, so that teachers also become, in some ways, paternal figures, inspiring both reverence and affection, as will be seen in the following sections[7].

letteraria e cronaca giornalistica, Pisa, ETS, 2019.

[2] E. Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, Pisa, Edizioni del Cerro, 1996, p. 36.

[3] Cfr. F. Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, Bari, Dedalo, 1997; R. Certini, Bambini e scolari nelle memorie di maestri e maestre, in C. Covato, S. Ulivieri (edd.), *Itinerari nella storia dell'infanzia. Bambine e bambini, modelli pedagogici e stili educativi*, Milano, Edizioni Unicopli, 2001.

[4] Cfr. Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 24. Inoltre, cfr. Covato, Ulivieri (edd.), *Itinerari nella storia dell'infanzia. Bambine e bambini, modelli pedagogici e stili educativi*, cit.; Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, cit.

[5] E. De Fort, *Storia della scuola elementare in Italia. Vol. 1: Dall'Unità all'Età giolittiana*, Milano, Feltrinelli, 1982, p. 196.

[6] Cfr. Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, cit.

[7] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia*

Considering women in education, the last decade of the Nineteenth Century is a period of great change with regards to the presence of women in schools[8]. In a short period of time, women started monopolising primary school as a result of particular circumstances, among which we can mention the low interest of men in an economically and socially undervalued job, the increasing demand for teachers due to the growing number of schools, the inclusion of compulsory schooling, and the exclusion of women from other careers in the public administration[9]. In addition, the work of the teacher was considered to be 'naturally' related to women as it was associated with their maternal and educational role at home[10]. Female teachers were more likely to win the trust of families because «[…] they give more guarantees of political and ideological reliability regarding the need to educate young generations to the values of submission, sacrifice and hard work that the moderate ruling class intends to pose at the basis of the new Italian state»[11].

On the one hand, this phenomenon brought to an important economic, cultural and social emancipation for women: females were able to develop a more complex gender identity in the Italian context. On the other hand, this tendency pushed women towards significant cultural difficulties and oppositions, which were usually not experienced by male teachers[12]. Furthermore, women's working conditions were not superior to those of men: the Casati law established that salaries for female teachers were allowed to be lower[13]. Moreover, women were also victims of a wide range of prejudices: for example, female teachers could not tutor in male classes because they were considered unsuitable to shape young boys' personality, and they were frequently victims of country defamation too. Female teachers were also victims of different forms of sexual blackmail and unwanted attention from the authorities, which were often followed by threats, gossip, and accusations directed to those women

tra Otto e Novecento, cit., p. 29.

[8] A. Ascenzi, *La figura della maestra nella scrittura di E. De Amicis*, «Quaderni di didattica della scrittura», n. 1, 2015, p. 68.

[9] Cfr. S. Ulivieri, *Donne e scuola. Per una storia dell'istruzione femminile in Italia*, in E. Beseghi, V. Telmon (edd.), *Educazione e ruolo femminile: dalle pari opportunità alla differenza*, Firenze, La Nuova Italia, 1992; C. Covato, *Un'identità divisa. Diventare maestra in Italia fra Otto e Novecento*, Roma, Archivio Guido Izzi, 1996.

[10] M.T. Trisciuzzi, *La scuola e i maestri narrati attraverso le rappresentazioni della letteratura per l'infanzia*, in G. Elia, S. Polenghi, V. Rossini (edd.), *La scuola tra saperi e valori etico-sociali. Politiche culturali e pratiche educative*, Lecce, PensaMultimedia, 2019, p. 1073.

[11] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 44. Original Italian text: «[…] danno più garanzie di affidabilità politica ed ideologica rispetto all'esigenza di educare le giovani generazioni ai valori di sottomissione, sacrifico e laboriosità che la classe dirigente moderata intende porre alla base del nuovo stato italiano». All the Italian texts are translated by the author.

[12] *Ibid*., p. 43.

[13] Ascenzi, *La figura della maestra nella scrittura di E. De Amicis*, cit., p. 68.

that, living alone and far away from their families, were perceived as immoral or morally dangerous[14].

2. Cuore, Il romanzo di un maestro *and* Primo maggio*: teachers between history and literature*

The school, conceived as a setting for training, teaching, transmitting values, is a recurring motif in the work of Edmondo De Amicis. In his novels *for* children and *on* children, the writer provides a cross-section of the education system between ideal and real, utopia and social criticism, considering both the harsh context of the late Nineteenth Century and the desire to change it, following an ideal model[15].

In this essay, three works by the author, *Cuore* (1886), *Il romanzo di un maestro* (1890) and *Primo maggio* (published posthumously in 1980), will be explored as significant in the historical and literary analysis of the teaching profession in post-unification Italy. The first two novels considered here, *Cuore* and *Il romanzo di un maestro*, were written in a short period of time and they are complementary: together they can offer a particularly rich picture of the scholastic panorama of the time and of the ideals expressed by the author. Indeed, a double reading can help readers to understand both works more deeply[16].

To begin with, *Cuore* shows a mythical and sentimentalist vision of the school[17]: it is a novel addressed to readers who «[…] had to refine their conscience as citizens, exalting it through rhetoric and ideals»[18]; a book that is therefore a «vehicle of civil conscience» in the post-unification period[19]. Thus, De Amicis stands as a guide for the Italian conscience: in *Cuore*, the school acts as an «ideological filter» and is «placed in the foreground and charged with

[14] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 43.

[15] Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, cit., p. 17; P. Boero, G. Genovesi, *Cuore. De Amicis tra critica e utopia*, Milano, FrancoAngeli, 2009, p. 16.

[16] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 20; Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, cit., p. 17.

[17] F. Cambi, *De Amicis et "Cuore": pour la formation de la conscience nationale dans l'école primaire. Quelques notes*, «Studi sulla Formazione», n. 1, 2017, p. 281; Trisciuzzi, *La scuola e i maestri narrati attraverso le rappresentazioni della letteratura per l'infanzia*, cit., p. 1069.

[18] Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, cit., p. 16. Original Italian text: «[…] dovevano affinare la propria coscienza di cittadini, esaltandola attraverso la retorica e gli ideali».

[19] *Ibid*.

meanings of civilization and progress, it is seen as the fulcrum of the universal emancipation of people […]»[20].

Il romanzo di un maestro is an opposite and complementary work: in this case, De Amicis examines the education system of his time giving a particularly critical judgement but, at the same time, entrusting to educators and education the possibility of a renewal. In order to do it, the writer does not deny education's shortcomings and everyday-life obstacles. In fact, if *Cuore* wants to commit itself on the social front and ideally restore educational institutions, *Il romanzo di un maestro* is a novel that aims to develop a strong inquiry; a book that, starting from the career of a teacher working in Piemonte, Emilio Ratti, underlines the concrete difficulties that educators had to face. Therefore, the school is approached on the one hand as a necessary and fundamental tool to build the new-born Italian nation and unite its citizens; on the other hand, as an institution to be denounced for the difficult conditions in which teachers and pupils have to work and learn[21].

Primo maggio, written four years after the editorial success of *Cuore*, is a borderline work: by recounting the adherence to socialism of Alberto, a teacher from Turin, De Amicis proposes the ethical values which were already expressed in *Cuore*, but combined with a harsh criticism of the precarious conditions of the proletariat, both adults and children. Therefore, it is a work characterized by positive feelings, but not softened and sweetened: *Primo maggio* is crude in the narration of the events and in describing the social gap between poor people and the bourgeoisie, without neglecting factors such as malnutrition, misery, suffering, oppression. De Amicis outlines a character distinguished by high values to analyse social injustice and denounce selfishness, while dealing with issues that go beyond the education system.

In these three works, through the characterization of numerous personalities (and in particular educators and teachers), it is possible to appreciate the author's ability to create detailed, real characters, a «gallery of original types»[22], which is characterized by considerable psychological depth. Great attention is also paid to the settings inside and outside the school, to the features that distinguish the professional and daily life of the teachers, to the main aspects of those activities related to teaching, so to create a choral narrative that places individual events in a broader and multifaceted social framework. As Simonetta Ulivieri writes: «By spreading fictitious cases that reflect reality and genuine

[20] *Ibid.*, p. 90. Original Italian text: «posta in primo piano e caricata di significati di civiltà e di progresso, viene vista come il fulcro di un'emancipazione universale dei popoli […]».

[21] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 21; Trisciuzzi, *La scuola e i maestri narrati attraverso le rappresentazioni della letteratura per l'infanzia*, cit., p. 1071.

[22] F. Targhetta, Il romanzo di un maestro *di Edmondo De Amicis: le ragioni della sua recente riscoperta*, «History of Education & Children's Literature», vol. XI, n. 2, 2016, p. 462. Original Italian text: «galleria di tipi originali».

instances of hateful persecution and suffering, literature acts as a mouthpiece to the population»[23]. Accordingly, De Amicis' literature becomes an important historical source, as well as a fundamental voice of denunciation and ideal construction in accordance with the founding values and needs of the time.

3. *Narrated teachers, rhetoric and social criticism*

In his works, De Amicis highlights the fundamental role of the teacher in the pursuit of a specific ideology and, at the same time, creates a detailed historical portrait of the figure of the elementary school teacher of the late Nineteenth Century[24], which is particularly harsh in the representation given by *Il romanzo di un maestro*. As Roberto Sani states, the book is a unique case in the literary panorama of the time as it proposes a «convincing fresco of teachers' conditions»[25] and

> a testimony of rare effectiveness, in which the realism […] of the events and subjects narrated allows […] to penetrate a world with extraordinary immediacy and to understand in its most authentic moves and dimensions a particularly important and controversial chapter of the cultural and social history of our country[26].

In the text, De Amicis meticulously reconstructs the educational problems of the time, using various sources such as ministerial inquiries, deliberations of municipal councils, and school magazines, so as to collect data and episodes which were successively reformulated in the narrative[27]. Unlike *Cuore*, which aims to offer the image of an ideal and idyllic teacher, extremely dedicated to sacrifice, *Il romanzo* is a work of accusation, a documentary on the real living conditions of teachers. To do this, De Amicis outlines the events of a young teacher, Emilio Ratti, who will have to face various difficulties that recall the

[23] S. Ulivieri, *La maestrina con la penna rossa. Immagini di maestre nell'Italia dell'800 fra letteratura e realtà*, «Cadmo», vol. 3, 1994, p. 56. Original Italian text: «la letteratura insieme alla pubblicistica, diffondendo casi fittizi che rispecchiano la realtà e casi reali di persecuzioni odiose e di sofferenza, agisce da cassa di risonanza nella popolazione più evoluta».

[24] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 24.

[25] R. Sani, *Accanto ai maestri. Edmondo De Amicis, l'istruzione primaria e la questione magistrale*, in Id., *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, p. 363. Original Italian text: «convincente affresco della condizione magistrale».

[26] *Ibid*. Original Italian text: «una testimonianza di rara efficacia, nella quale il realismo […] delle vicende e dei soggetti narrati consente […] di penetrare con straordinaria immediatezza un mondo e di comprendere nelle sue movenze e dimensioni più autentiche un capitolo particolarmente importante e controverso della vicenda culturale e sociale del nostro paese».

[27] *Ibid*.

real challenges of post-unification society. Emilio Ratti becomes a teacher for a «domestic misfortune», as the beginning of the novel specifies: this profession was often preferred for social reasons rather than personal preferences.

> Some had been pushed to that career by the ambition to rise above their social class, others by their repugnance for mechanical work, or by the failed attempt on different trades, various because of a misfortune that had thrown their family into poverty, few because of their so-called professional vocation[28].

In Emilio's case, the misfortune consists in the death of his father, followed by the death of his mother, who leaves the protagonist and three younger brothers alone. So, Emilio, helped by a family of benefactors, passes the exam for the *scuola normale*. Although the young teacher is not driven by the 'vocation for teaching', Emilio performs his work gladly and meticulously. De Amicis describes him as a man with great kindness, who read many books thanks to his father's typography; with a strong paternal feeling towards his younger brothers, as well as a remarkable curiosity for the educational world. Thus, Emilio has a good inclination that makes him a respectable teacher.

According to Enzo Catarsi, the figure of the teacher is therefore developed on virtues and qualities more than on technical skills and knowledge, so that he or she can educate to specific values, as a sort of «missionary of civilization and peace»[29]. The characteristics of the good teacher – extensively outlined in *Cuore* – are resumed in a particular episode of *Il romanzo*, an episode in which the school delegate's wife asks Emilio Ratti to have some private lessons for her son. In her opinion, the ideal teacher must show patience, goodness, sacrifice and, above all, *heart*, thus proposing a *trait d'union* between the two works.

However, when the ideal level has to interface with reality, teachers' mission finds a difficult response: once arrived in the small village of Garlasco, Emilio quickly understands the difficulties he will face, both in terms of scholastic environment and the material available, and in terms of the students he will have to deal with. Considering the environments, Ratti immediately underlines the deterioration of the school:

> […] a long, narrow room with an archivolt in the middle, badly lit by two round windows, too high, perhaps an ancient oratory. There were various posters of animal and plants on the walls, a niche with some geometric solids inside, a map between the two windows;

[28] E. De Amicis, *Il romanzo di un maestro*, a cura di A. Ascenzi, P. Boero, R. Sani, Genova, De Ferrari, [1890] 2007, p. 2. Original Italian text: «Alcuni erano stati cacciati in quella carriera dall'ambizione di innalzarsi sopra la loro classe sociale, altri dalla ripugnanza per il lavoro meccanico, o dell'esperimento fallito di mestieri diversi, vari da una disgrazia che aveva precipitato la loro famiglia nella povertà, pochi dalla cosiddetta vocazione professionale».

[29] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 24; Original Italian text: «missionario di civiltà e di pace».

but everything was in bad conditions. The desks, badly built, were arranged in two long rows and were covered with engravings and inscriptions of every kind, hollowed, indented, perforated, scraped, as if they had served for ten years to the manual work of a schoolchildren of carvers and blacksmiths[30].

For what concerns the students, Emilio shows a sense of disgust and anxiety, he calls them «a bunch of piglets»[31]. The children have to work in the fields and consequently do not pay attention to school lessons, they have no time to study, and present poor health conditions:

They came with flakes on their faces and necks, their clothes were soiled with earth, full of straw and they contended for places with their elbows and hips: then, they put their hands in their mouths and heads, scratched their chests and armpits like scabies and dried their sweaty faces with their hands covered with ink […][32].

Students' lives are made of misery, suffering, loneliness: they experience adult situations that affect them and have a direct influence on school and life conditions. Anita Gramigna writes: «they subtend, behind their bold faces, dirtied with earth, a varied universe where the educational and scholastic problem is merged with the social question»[33]. Among the daily obstacles, the author also recalls the composition of classes, often excessively heterogeneous and of considerable age difference. Teacher Vetti, for example, points out that she is the teacher of boys and girls of very different ages who, in addition, do not attend school regularly:

Today I have twenty-three pupils, tomorrow they will be half, the day after tomorrow twice as many, and maybe all new faces from one day to the next. The serious problem is to combine the hours of school with those of pasture. After the meal, they're tired and don't come anymore. And then, some of them have the books, others do not. Look, all the boys and girls at the first desk have no pen or paper. How can they be taught to write? The boys bet their pens in the street, the girls sell their paper. Almost all of them are forced to

[30] *Ibid.*, p. 16. Original Italian text: «[…] una stanzaccia lunga e stretta, con un archivolto nel mezzo, malamente rischiarata da due finestre tonde, troppo alte, forse un antico oratorio. C'erano alle pareti vari cartelloni di piante di animali, una nicchia con dentro qualche solido geometrico, carta geografica tra le due finestre; ma tutto in cattivo stato. I banchi, mal costruiti, disposti in due lunghe file, erano coperti di incisioni e d'iscrizioni di ogni genere, incavati, dentellati, forati, raschiati, come se avessero servito per dieci anni agli esercizi di lavoro manuale di una scolaresca di intagliatori e di fabbri».

[31] *Ibid.*, p. 25. Original Italian text: «un branco di porcellini».

[32] *Ibid*. Original Italian text: «Venivano con le scaglie al viso nel collo, coi panni imbrattati di terra e pieni di paglia e si contendevano i posti a gomitate e a fiancate: poi si mettevano le mani in bocca e in capo, si grattavano il petto e le ascelle come scabbiosi e si asciugavano i visi sudati con le mani conce d'inchiostro […]».

[33] G. Genovesi, A. Gramigna, *La scuola come romanzo: immagini e ideali di scuola e di insegnanti nella memorialistica e in De Amicis*, Ferrara, Annali dell'Università, 1995, p. 108. Original Italian text: «essi sottendono, dietro i volti spavaldi, imbrattati di terra, un universo variegato dove il problema educativo e scolastico è tutt'uno con la questione sociale».

have their work done at school because they don't have inkwells at home or can't find time. Finally, there are girls of fifteen and girls of seven[34].

Even though teachers are interested in the conditions and training of the children, they do not have the resources to teach efficiently[35]. For this reason, among the various models of teachers presented in *Il romanzo* we find teachers who use force, violence and coercion to ensure the respect of their pupils. An example is Carlo Lérica, fellow student of Emilio Ratti, a particularly domineering, aggressive man, dissatisfied with his profession, so much so as to criticize Ratti's teaching method, negatively emphasizing that he is a teacher of the *heart*[36]. A second example is teacher Delli, who uses corporal punishment to maintain discipline in the classroom: each student's error corresponds to a punishment based on physical pain. According to Delli, the teacher must not be a passionate figure, but an impersonal, inflexible profile, totally detached from a potential father figure[37].

In 1877, the Coppino law on compulsory education was passed, a law that was considered by De Amicis in *Il Romanzo*: when pupils do not attend school, teachers go to visit them, but often meet the opposition of their parents, in particular in the poorest families[38]. Hence, De Amicis examines the complex relationship between school and family, pointing out its weaknesses: Emilio is astounded that parents are not interested in their children's education and instruction, so as not to go to school to find out about their behaviour and scholastic progress. Despite his politeness, the teacher is coldly welcomed by the pupils' parents: many families frankly declare that they do not want to send their children to school for work-related reasons, some because the school is too far away, others for alleged health reasons. Although the teacher tries to discuss with the parents and convince them, the answers of the families are rude and sarcastic and they usually reject the important bond between school and family[39].

[34] De Amicis, *Il romanzo di un maestro*, cit., p. 182. Original Italian text: «Oggi ci ho ventitré alunni, domani saranno la metà, dopodomani il doppio, e magari tutte facce nuove da un giorno all'altro. L'affare serio è di combinare le ore della scuola con quelle della pastura. Dopo la pastura sono stanchi e non vengono più. E poi, chi ha i libri, chi non ne ha. Guardi, tutti i bimbi e le bimbe del primo banco non hanno né penna né carta. Come si fa insegnare a scrivere? I maschi si giocano le penne per la strada, le bimbe si vendono la carta. A quasi tutti sono obbligata a far fare il lavoro in scuola perché a casa non hanno calamaio o non trovano tempo. Infine, ci sono ragazze di quindici anni e bambine di sette».

[35] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 33.

[36] *Ibid.*, pp. 32-33.

[37] *Ibid.*

[38] Trisciuzzi, *La scuola e i maestri narrati attraverso le rappresentazioni della letteratura per l'infanzia*, cit., p. 1071.

[39] *Ibid.*, p. 35.

Teachers are engaged in a compelling educational mission which is not satisfying either in terms of the results collected by the students or in terms of the financial compensation received. So, Ratti must experience a harsh reality and compare his occupational ideal with the popular conception of what a teacher should be. Dreams and real life collide and astonish Emilio page after page:

Entering for the first time, as a teacher, into a classy society not deprived of a certain culture, he had believed that his profession was held in a level of esteem corresponding to its real importance, and to the many delicate difficulties of every kind which he had found and was finding every day. And he was very surprised to realize that the name of teacher sounded very different from what he had imagined, that his profession seemed to be linked to the idea of nothing more than mean and trivial, and almost to a shadow of ridicule, like that of the storytellers and improvisational poets in the fairs[40].

In *Cuore*, the approach selected is opposite. Enrico's teacher is described as an appreciated man, gifted with goodness and courtesy, totally committed to teaching in a much more idyllic context[41]. When he reprimands his students, he is gentle and polite, setting a good example. He introduces himself to the class with the following words:

We have a year to spend together. Let us spend it well. Study and be good. I have no family. You are my family. I still had my mother last year. She died. I was left alone. I have no more affection in the world than you, no more love, no more thought than you. You must be my children. I love you. You must love me. I don't want to punish anyone. Show me that you are heartfelt children; our school will be a family and you will be my consolation and my otherness. I do not ask you for a verbal promise; I am sure that in your heart you have already said yes to me. And I thank you[42].

[40] De Amicis., *Il romanzo di un maestro*, cit., p. 60. Original Italian text: «Entrando per la prima volta, in qualità di maestro, in una società signorile non priva di una certa cultura, egli aveva creduto che la sua professione vi fosse tenuta in un grado di stima corrispondente alla sua reale importanza, e alle molte delicatissime difficoltà di ogni specie, ch'egli vi aveva trovate, e v'andava trovando ogni giorno. E fu invece molto stupito al riconoscere che quel nome di maestro suonava agli orecchi dei più assai diverso da quello che aveva immaginato, che la sua professione pareva legata all'idea di non so che di meschino e di trito, e quasi un'ombra di ridicolo, come quella dei cantastorie e dei poeti improvvisatori delle fiere».

[41] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., pp. 63-64.

[42] E. De Amicis, *Cuore. Libro per ragazzi*, a cura di L. Tamburini, Torino, Einaudi, [1886] 2001, pp. 13-14. Original Italian text: «Abbiamo un anno da passare insieme. Vediamo di passarlo bene. Studiate e siate buoni. Io non ho famiglia. La mia famiglia siete voi. Avevo ancora mia madre l'anno scorso: mi è morta. Son rimasto solo. Non ho più che voi al mondo, non ho più altro affetto, altro pensiero che voi. Voi dovete essere i miei figliuoli. Io vi voglio bene, bisogna che vogliate bene a me. Non voglio aver da punire nessuno. Mostratemi che siete ragazzi di cuore; la nostra scuola sarà una famiglia e voi sarete la mia consolazione e la mia alterezza. Non vi domando una promessa a parole; son certo che, nel vostro cuore, m'avete già detto di sì. E vi ringrazio».

Thereby, the teaching profession becomes a mission, a vocation to be followed in order to improve society. As a result, teachers are charitable and interested in the results of their students. In the last sections of the book, Emilio's teacher apologizes for those moments in which he was too strict, impatient or demanding with the students[43]. Similarly, in *Cuore*, engineer Bottini's memories of his teacher are extremely positive and melancholic: «He was the first man who loved me and did good for me after my father. […] And every day the same mood, always scrupulous, full of good will and attentive, as if every day he was doing school for the first time»[44].

The episode where Enrico's father goes to visit his teacher is particularly significant. It is, according to Catarsi, a clear narrative artifice, a forced literary fiction: the teacher, after more than forty years, still remembers the place occupied in the classroom by the pupil, as well as the name of the street where he lived, and some precise scholastic episodes. This fragment of the novel, though artificial, gives us an important insight into the teacher's living conditions during his old age. He worked until the age of eighty-two and now receives a very low pension. His modest house is described, and the text stresses that: «poor teacher, after sixty years of work, is this all your prize?»[45]. On the one hand, De Amicis highlights the sad and unjust old age of a teacher who trained new generations of boys for decades; on the other hand, there is a particular attention to the reaction of Enrico and his father towards these circumstances. The teacher's conditions cause a feeling of regret and sorrow, in contradiction to the angelic happiness of the teacher, who is willing to be satisfied with what he possesses, simply living with some of the good memories of the past. Therefore, compared to *Il romanzo*, *Cuore* offers a greater social and familial consideration for the figure of the teacher, so much so that Enrico's father recommends his son to be grateful to the instructor[46]. *Cuore* intends to give a precise example of dedication in order to promote the cultural and economic development of the country starting from school.

In *Primo maggio*, the author proposes the portrait of a teacher, Alberto, characterized by great generosity and a strong affection for his students: a good and honest figure, with a high moral and egalitarian ideals that will cause him to be marginalized by his friends, colleagues, and his family. The professor is fired and, after embracing the socialist cause, he dies as a result of a gunshot

[43] *Ibid.*, p. 69.

[44] De Amicis, *Cuore. Libro per ragazzi*, cit., p. 247. Original Italian text: «È lui il primo uomo che mi volle bene e che mi fece del bene dopo mio padre. […] E tutti i giorni il medesimo umore, sempre coscienzioso, pieno di buon volere e attento, come se ogni giorno facesse scuola per la prima volta».

[45] *Ibid.*, p. 252. Original Italian text: «povero maestro, dopo sessant'anni di lavoro, è questo tutto il tuo premio?».

[46] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 74.

fired by a soldier during the repression of a demonstration. This death marks the heroism of the character and his complete dedication to the values that had alienated him from his affections, values that go beyond schooling to become social issues. Through his characters' reflections on the topic, De Amicis offers a multi-faceted overview of the socialist matter, and does it without avoiding a reformist approach and some thorny questions and perplexities about how to take action as a socialist.

The figure of Professor Alberto stands on the border between the two previously analysed novels. To begin with, in *Primo maggio* it is possible to note a sort of vocation – or rather, inclination – that prompts the protagonist to undertake the literary teaching career for «[…] the natural tendency of his own ingenuity», but also to pursue a revolutionary spirit, since the profession would have given him «an unusual grace, the title of professor of literature would have seemed a singular and amiable quality, which would give the image of a somewhat pedantic and somewhat shabby scholar»[47].

Moreover, in Alberto the ideal of *Cuore* and the concreteness of *Il romanzo* intersect: the professor has strong values that he would like to transmit to his students, and those values are deeply rooted in contemporary social issues, values that openly show the need for a revolution beyond the schooling system, starting precisely from those cruel social injustices Alberto does not want to tolerate. The ideals promoted by the professor are extremely personal and they shape the figure of a teacher who goes beyond mere conceptual didactics in order to educate, enlighten and form critical minds despite the adversities and frailty of the subject:

> From the very beginning of the school year, he had raised the question to himself: whether it was his duty and his right, not to inculcate in his pupils his own ideas, but to enlighten them, at least, about the nature and importance of the great issue that was troubling the world. And, after mature examination, his conscience answered him yes. He had thought that "to educate" means nothing if one does not educate for the future, and, at the same time, a humanities teacher, who is also a civil educator, must prepare young people for a new life, open their spirit to those ideas that arise, and be an active and impulsive force while teaching[48].

[47] E. De Amicis, *Primo maggio*, a cura di G. Bertone, P. Boero, Milano, Garzanti, 1980, p. 24. Original Italian text: «[…] la tendenza naturale del proprio ingegno»; «una grazia insolita, sarebbe parso una qualità singolare ed amabile quel titolo di professore di lettere, che suol dar l'immagine d'uno studioso un po' pedante e un po' sciatto».

[48] *Ibid*., p. 131. Original Italian text: «Fin dal principio dell'anno scolastico egli aveva posto a se stesso il quesito: se fosse suo dovere e suo diritto, non d'inculcare nei suoi alunni le proprie idee, ma di illuminarli, se non altro, intorno alla natura e all'importanza della grande questione che agitava il mondo. E, dopo maturo esame, la coscienza gli aveva risposto di sì. Egli aveva pensato che «educare» non significa nulla se non si educa per l'avvenire, e che però un insegnante di lettere, che è pure un educatore civile, deve apparecchiare i giovani alla vita nuova, aprire il loro spirito alle idee che sorgono, essere nell'insegnamento una forza attiva e impulsiva».

Alberto's social complaints are not restricted to the scholastic environment, but they also involve his son, Giulio. In this way, the author depicts the figure of a 'life' teacher: he is not just ready to embrace young people in his battle against the dynamics of capitalism, but he is also ready to open students and children's minds so to join the fight for equality.

Giulio, you see how many people are around you, who spend their lives sweating at work and don't get enough to live humanly, how many millions of children left in ignorance and in brutality, and how many families reduced to hunger with no fault of their own; you see how many unjust inequalities, how many wraths, how many hatreds. Now, there is a way to make this great misery disappear, or most of it, to make that no one needs work and it gets more dignified for everyone, that all children are educated and instructed, that unjust inequalities disappear, that all hatred ceases, that society becomes almost an immense family, in which everyone, out of self-interest, desires the good of all the others[49].

4. *School feminisation and female teachers' depiction*

School feminisation[50] is a phenomenon of great importance to which De Amicis pays particular attention. While focusing on the story of a male teacher, *Il romanzo* is a significant literary evidence of the evolution of female teachers' identity in the school environment; it is a novel that underlines the double discrimination suffered by these figures, both as teachers and as women[51]. De Amicis builds a complex

gallery of female figures, of teachers of different ages and experience, whose stories and destinies outline an extraordinarily rich and articulated overview of complex human and professional itineraries that mark the presence of women in the Italian primary school in the second half of the Nineteen Century[52].

[49] *Ibid.*, p. 110. Original Italian text: «Giulio, tu vedi quanta gente c'è intorno a te, che suda al lavoro per tutta la vita e non ne cava tanto da vivere umanamente, quanti milioni di ragazzi lasciati nell'ignoranza e nell'abbrutimento, e quante famiglie ridotte alla fame senza loro colpa; vedi quante diseguaglianze ingiuste, quante ire, quanti odi. Ora, c'è modo di far sì che questa grande miseria sparisca tutta o in gran parte, che il lavoro non manchi a nessuno e diventi più umano per tutti, che tutti i ragazzi siano istruiti e educati, che le disuguaglianze ingiuste scompaiano, che gli odi cessino, che la società diventi quasi un'immensa famiglia, in cui ciascuno, per interesse proprio, desideri il bene di tutti gli altri».

[50] Cfr. S. Ulivieri, *Donne e scuola. Per una storia dell'istruzione femminile in Italia*, cit.; Covato, *Un'identità divisa. Diventare maestra in Italia fra Otto e Novecento*, cit.; A. Cagnolati (ed.), *Tessere trame, narrare storie. Le donne e la letteratura per l'infanzia*, Roma, Aracne, 2013.

[51] Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, cit., p. 9.

[52] Ascenzi, *La figura della maestra nella scrittura di E. De Amicis*, cit., p. 71. Original Italian text: «galleria di figure femminili, di maestre di diverse età ed esperienza, le cui storie e i cui destini disegnano uno spaccato straordinariamente ricco e articolato di complessi itinerari umani e professionali che contrassegnano la presenza delle donne nella scuola primaria popolare italiana

For what concerns this subject, the author does not deny the difficulties and the harassment inflicted to female teachers, but stresses it connecting his works to the contemporary chronicle, so as to develop a remarkable literary denunciation. In 1886, the year in which De Amicis delivered the manuscript of *Il romanzo* to his publisher, Italia Donati, an Italian teacher, committed suicide, exposing to public opinion the dramatic experiences of numerous colleagues, who were forced to defend themselves against the persecutions of various categories of harassing men and to cope with popular gossip. The publication of *Il romanzo*, which was preceded by the great success of *Cuore*, provides a further voice for the experiences of teachers, revealing to popular opinion a new vision, without filters, of the school system, also from a female perspective[53].

Therefore, De Amicis proposes different personal and professional life stories, which follow a tortuous common path. For example, the Ligurian writer tells the reasons that led female teachers to choose this profession: again, not a personal vocation but a decision taken to deal with family needs[54]. Female teachers are indeed «hearty workers», but because of necessity, and not following personal desires and aspirations[55]. As Anna Ascenzi notes, one of the most emblematic figures could be Emilio Ratti's cousin, a teacher who decides to undertake this career in order to look for a place far from her father; or the exemplary case of teacher Adelina Gamelli, ironically called «la letterata» by the inhabitants of the village where she works. Teacher Gamelli's professional vocation is actually the result of her naivety, of her ingenuous dreams, which are destined to collapse when facing the crude reality. She is, indeed, a woman full of «childish illusions»[56], who imagines to work under favourable conditions, with the support and help of parents and authorities, and then has to reconsider her hopes. The author is also ironic on the figure of the teacher proposed by those books for young ladies, which are usually readings full of female stereotypes and sentimentality[57].

Thus, De Amicis's teachers abandon their vocations, dreams, and aspirations to live a bitter reality of hard sacrifices and harassment, hostility and marginalization[58]. However, these teachers learn to stand up, to enhance their agency, to change negative contexts, to fight injustice. In this regard, *Il romanzo* proves to be a more audacious work than *Cuore*, where, quoting

del secondo Ottocento».

53 Cfr. Ulivieri, *La maestra con la penna rossa. Immagini di maestre nell'Italia dell'800 fra letteratura e realtà*, cit.; Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, cit.

54 Cfr. S. Soldani (ed.), *L'educazione delle donne. Scuole e modelli di vita femminile nell'Italia dell'Ottocento*, Milano, FrancoAngeli, 1989.

55 Cfr. Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit.

56 De Amicis, *Il romanzo di un maestro*, cit., p. 284.

57 Ascenzi, *La figura della maestra nella scrittura di E. De Amicis*, cit., p. 73.

58 *Ibid*.

Ascenzi «[…] the story of individual teachers is almost in shadow because it is placed in a narrative context dominated by the rhetoric of good feelings and a sort of pedagogical optimism centred on the need to be […]»[59]. In addition, De Amicis recounts the difficulties of female teachers not only at an economic level, but also at a social level, and he does so by introducing a character, the teacher of Turin[60], a respectful woman who offers repetitions to the children of a rich lady, but is frequently treated like a maid, without recognizing the educational and cultural importance: a figure who embodies «the social marginality of a profession that increasingly resembled that of a 'servant', of a subordinate»[61].

In *Il romanzo*, the writer presents a series of portraits well rooted in the social context of the time, such as teacher Strinati, who was met for the first time by Ratti on her doorstep, while feeding chickens that she uses to round up and gain more money. De Amicis reveals her professional vicissitudes and the oppression suffered. The teacher is the victim of a so-called rascal: after years of teaching, the woman is not reconfirmed at school so that she cannot receive a benefit. Strinati is therefore forced to give up her pension in order to be confirmed at school again[62].

In addition, De Amicis recalls the theme of sexual persecution, a rather common phenomenon in this era, particularly with regard to unmarried female teachers. As the author mentions through the novel, many men, belonging to different age groups, believed they had the right to harass the local schoolteacher «as if she were paid by the Town Hall for the relief of the taxpayers' free hearts»[63]. These are real life conditions, also reported in the chronicles of the time, which in some cases pushed the teachers to commit suicide, as in the case of Italia Donati. In spite of the high number of sexual proposals, teachers' behaviour had to be irreproachable as it was subject to popular judgement, most of all in the smallest countries, thus exercising considerable control over the private life of these women[64]. Even *Primo maggio* does not hide these persecutions, narrating, for example, the misfortunes of teacher Angiola Maria, tormented by a municipal administrator who was rejected by the woman and

[59] *Ibid.*, p. 77. Original Italian text: «[…] la vicenda di singole figure magistrali risulta quasi in ombra in quanto collocata in un contesto narrativo dominato dalla retorica dei buoni sentimenti e da una sorta di ottimismo pedagogico centrato sul piano del dover essere […]».

[60] Cfr. Ascenzi, *Drammi privati e pubbliche virtù*, cit.

[61] Trisciuzzi, *La scuola e i maestri narrati attraverso le rappresentazioni della letteratura per l'infanzia*, cit., p. 1070. Original Italian text: «la marginalità sociale di una professione che assomigliava sempre di più a quella di una 'serva', di una sottoposta».

[62] Cfr. Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit.

[63] De Amicis, *Il romanzo di un maestro*, cit., p. 268. Original Italian text: «come se essa fosse stipendiata dal Municipio per sollazzo dei cuori liberi dei contribuenti».

[64] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 52.

led her to a series of misfortunes, including several relocations, the loss of her job and, finally, the death of her husband and her son.

Furthermore, an important character outlined by De Amicis in *Il Romanzo* is teacher Galli, a woman whose sensitivity and love for children is emphasized by the author. The writer rhetorically underscores the character's kindness so as to hint at the qualities that a teacher should ideally have: the woman is completely devoted to his profession and states that in life she only felt love for children and childhood. Moreover, teacher Galli explicates De Amicis' ideology for what concerns an inter-class society: while having a discussion with Ratti, she declares that she dislikes the idea of society divided into social classes, especially with regard to children, who are often forced into difficult living conditions. The teacher's philosophy avoids a political approach, as it is simply based on her love for childhood, sketching the image of an ideal, equal society[65].

In these portraits, kindness and affection are peculiarities that, according to Catarsi, constitute a predominantly female prerogative[66]. In fact, in women De Amicis recognizes a greater sensitivity and, consequently, a greater 'talent' in educating young children: the figure of the female teacher is therefore inevitably tied to that of the mother. A female portrait that has gained particular fame is that of the teacher with the red pen in *Cuore*[67]: a teacher whose characteristics are mostly maternal, affable, and sweet and, for this reason, she easily gains Enrico's affection. Her literary depiction has remained among one of the most appreciated by *Cuore*'s readers as it aspires to an ideal of the teaching profession that can win the hearts of the pupils despite the adverse conditions of Italian society.

But there is another one which I also like; the schoolteacher of the first class, number three, the young one with a pink face, who has two nice little dimples in her cheeks, and wears a big red pen on her cap and a small yellow glass cross hanging from her neck. She's always cheerful, she keeps her class cheerful, she always smiles, she always shouts with her silvery voice and seems to sing, beating her wand on the desk and clapping her hands to ask for silence; then, when they leave, she runs like a little girl behind them to put them back in line; and to one pupil she lifts up his lapel, and to the other she buttons her coat; she follows them into the street so that they do not scuffle, she begs their relatives that they may not be punished at home, she gives pills to those that cough, she lends her coat to those that are cold; and she is constantly tormented by the little students who caress her and ask her for kisses, pulling her by the veil and by the mantle; but she lets them do it, and kisses them all, laughing, and every day she returns home ruffled and with no voice, all panting and all happy, with her beautiful dimples and her red pen[68].

[65] *Ibid.*, p. 53.

[66] *Ibid.*

[67] Cfr. Ulivieri, *La maestra con la penna rossa. Immagini di maestre nell'Italia dell'800 fra letteratura e realtà*, cit.

[68] De Amicis, *Cuore. Libro per ragazzi*, cit., pp. 90-91. Original Italian text: «Ma ce n'è un'altra che mi piace pure; la maestrina della prima inferiore numero 3, quella giovane col viso color di rosa, che ha due belle pozzette nelle guance, e porta una gran penna rossa sul cappellino e una crocetta di

Conclusion

De Amicis works on the literary portrayals of teachers on two different levels, real and ideal. The three works briefly analysed in this essay propose a complementary and rich vision of this profession during the end of the Nineteenth Century in Italy: *Il romanzo* offers a verist approach that aims at social denunciation, at the analysis of the poor working and educational conditions offered by schools, and at the criticism of the daily problems that pupils and teachers had to face; in *Cuore*, the reader finds a new hope for the future, an effort to consider a reform, a literary utopia oriented towards the revolution and the unification of Italy; *Primo Maggio*, starting from the protagonist's adhesion to socialism, outlines an educational approach that aims at critical thinking and proposes an interaction between idealization and social reality, between criticism and the urge to social change.

In all of the three novels, the teacher or educator is characterised by a sort of 'Enlightenment'. As Catarsi writes, De Amicis's ideals are based on «[…] the conviction that the process of constructing Italy as a nation should have included a leading role for schools and for teachers, missionaries of those values that should have fuelled the building of a popular homeland»[69]. Thus, literary narration becomes a vehicle to critically and utopianly narrate reality, leaving an important historical documentation, but also a reflection on the hope for change which is certainly needed. Reality and fiction intertwine and mix: reality becomes fiction, and fiction becomes the fundamental interpretative key of the real. The result consists of extremely multifaceted figures of teachers, men and women, who accompany the reader in post-unification history, offering us a perspective mediated between the desires of the time and the actual social conditions.

vetro giallo appesa al collo. È sempre allegra, tien la classe allegra, sorride sempre, grida sempre con la sua voce argentina che par che canti, picchiando la bacchetta sul tavolino e battendo le mani per impor silenzio; poi quando escono, corre come una bambina dietro all'uno e all'altro, per rimetterli in fila; e a questo tira su il bavero, a quell'altro abbottona il cappotto perché non infreddino, li segue fin nella strada perché non s'accapiglino, supplica i parenti che non li castighino a casa, porta delle pastiglie a quei che han la tosse, impresta il suo manicotto a quelli che han freddo; ed è tormentata continuamente dai più piccoli che le fanno carezze e le chiedon dei baci, tirandola pel velo e per la mantiglia; ma essa li lascia fare e li bacia tutti, ridendo, e ogni giorno ritorna a casa arruffata e sgolata, tutta ansante e tutta contenta, con le sue belle pozzette e la sua penna rossa».

[69] Catarsi, *I maestri e il «Cuore». La figura del maestro elementare nella letteratura per l'infanzia tra Otto e Novecento*, cit., p. 57. Original Italian text: «[…] la convinzione che il processo di costruzione dello Stato nazionale avrebbe dovuto prevedere un ruolo di primo piano per la scuola e per i maestri, missionari di quei valori che avrebbero dovuto elementare l'edificazione della patria di tutti».

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Celebrations of Italiannes: italian immigration in Rio Grande do Sul and schools, between memory and history (1924-1926)

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ABSTRACT: The mass migrations that occurred from the 19th to the 20th century are characterized by the construction of traditions and identity processes in which school played a major role. There was a broad range of forms and initiatives by means of which local authorities and Brazilian policies on the one hand, and Italian on the other sought to mediate identities. The settlement of groups of immigrants in the colonization areas of Rio Grande do Sul (RS) at the end of 1875 was progressively accompanied by the rise of small municipalities carrying the names of their cities of origin, such as New Rome, New Vicenza, New Padua, or recalling Garibaldi, the hero "of two worlds", as well as other toponyms that mark the ethnic bonds. As the municipalities developed, other identity and celebratory markers of Italian ethnicity appeared, with the inauguration of squares and schools, mutual aid societies, clubs and sociability spaces such as chapels and their surroundings in rural areas. They formed memory spaces that (re)invented traditions and negotiated customs and ways of life that were seen as "Italian". The objective of this text is to analyze the pedagogical value of the commemorative practices between Italiannes and Brazilness, that took place in the colonization areas of Rio Grande do Sul as builders of memories and ethnic identity processes taking school into account. The methodological procedures employed were the historical document analysis of the empirical body consisting of consular reports, press, letters and photographs. A look is taken at ethnic celebrations, especially those commemorating the 50th anniversary of immigration (1925) which were expressions of the ethnic identity processes that educated and highlighted ethnicity and can be considered from the viewpoint of negotiation between Italiannes and Brazilness.

EET/TEE KEYWORDS: Italian immigrants; School; Fiftieth Anniversary of Italian immigration; Identity process; Brazil; XIXth-XXth Centuries.

Introduction

> For a half a century, with tenacity, we forged our destiny in this free land […] proud of knowing that we werecooperating with the growing prosperity of Rio Grande do Sul[1]

The opening epigraph of this text was taken from one of the recurrent newspaper articles dedicated between 1924 and 1926 to the celebrations of the 50th anniversary of Italian immigration to Rio Grande do Sul. The commemorations of the 50th anniversary represent a foundational act in the history[2] of Italian immigration to Rio Grande do Sul, affirming the representations of the Italian immigrant as Catholic and hard-working. In the preparations, the festivities and the memories created, beginning with the 50th anniversary, traditions were reinvented and the 'epic of Italian immigration', of work, progress and faith was recalled anew in the identity processes of their descendants.

Thus, the objective of this article is to look at school to analyze the pedagogical value of the practices of commemoration between Italiannes and Brazilness, experienced in the colonization areas of RS, as builders of memories and ethnic identity processes[3]. Participation in processions, commemorations,

[1] Cover page of the «Staffetta Riograndense» newspaper, on November 5, 1924.

[2] According to Constantino the configuration of an identity process that very strongly appeals to the immigrants and their descendants in the History of Rio Grande do Sul is directly connected to the 50th Anniversary celebrations in 1925. The author says that: «In 1920 the Historical and Geographic Institute of Rio Grande do Sul (Instituto Histórico e Geográfico do Rio Grande do Sul) was founded and its activity notably increased historiographic production, always keeping the immigrant at the margin. The publication of a Journal helped define the intended identity, emphasizing Portuguese colonization, relations with the River Plate region, besides recurrently emphasizing the Farroupilha Revolution. The situation changed during the period in which Fascism ascended in Italy, when there were strong leaders in the Italian group of Rio Grande do Sul, contaminated by the action of diplomacy», N.S. de Constantino, *Estudos de imigração italiana: tendências historiográficas no Brasil meridional*, in *Anais do Simpósio Nacional de História ANPUH*, 2011, p. 4. Available at: file:///C:/Users/hp/Downloads/nuncia%20maria%20(1).pdf (last access: 3.06.2017).

[3] About school among the Italian immigrants and their descendants in RS, see A. Barausse, *From the Mediterranean to the Americas. Italian ethnic schools in Rio Grande do Sul between emigration, colonialism and nationalism (1875-1925)*. «Sisyphus. Journal of Education», vol. 4, n. 1, 2016 e T.Â. Luchese, *O processo escolar entre imigrantes no Rio Grande do Sul*, Caxias do Sul, UCS, 2015. For an overall historiographical perspective in the field of relation between migrations and education see A. Ascenzi, A. Barausse, T.Â. Luchese, R. Sani, *Migrations and History of education in a transnational view between Italy and Brazil in 19th and 20th centuries*, «History of

civic parades, and singing anthems, poetry, theater plays, and a a set of rituals that celebrate the 'origin' of the immigrants and nostalgically laud the past, was practiced in schools and also in the children's other spaces of sociability. The memories that are to be perpetuated about this past were stimulated.

The methodological procedure performed was to analyze historical documents of the empirical corpus constituted by consular reports, newspapers[4], correspondence and photographs. For a better understanding of the characteristic traits by which the collectivity of Italians present in Rio Grande do Sul wanted to represent itself abroad, and the consequences of 'fascistization' in the commemorative events, it is useful to analyze a set of sources produced during the different moments of celebration, especially some documents kept in the Diplomatic Archives of the Ministry of Foreign Affairs (MAE –Ministerio das Relações Exteriores). Attention is paid to the ethnic celebrations[5], especially those regarding the 50th anniversary of immigration (1925), which were manifestations of the ethnic identity processes that educated and highlight ethnicity, and can be considered from the standpoint of negotiation between Italiannes and and Brazilness.

1. *«Jubileo del lavoro»*[6]*: preparations for the 50th Anniversary celebrations*

The most important event of the Italian colony took place during the first half of the 1920s in the state of Rio Grande do Sul: the celebration of the fifty years of colonization. The celebration occurred at a very specific time. Consul Arduini[7], in a report sent to the Minister in 1925, signaled that the

Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 227-262.

[4] The main newspapers researched were «Il Corriere d'Itália» and «Staffetta Riograndense», published in Italian and widely circulated among the immigrants and their descendants (about Staffetta see G. Valduga, *Paz, Itália, Jesus. Uma identidade para imigrantes italianos e seus descendentes: o papel do jornal Correio Riograndense*, Porto Alegre, EDIPUCRS, 2008 and about Corriere see T.Â. Luchese, *Catolicidade e Italianidade no Jornal Il Corriere D'Itália, RS, Brasil (1913-1927)*, in A. de Ruggiero; V.B.M. Herédia, A. Barausse (edd.), *História e narrativas transculturais entre a Europa Mediterrânea e a América Latina*, Porto Alegre, Caxias do Sul, EdiPUCRS, EDUCS, 2017, Vol. 1, pp. 277-300. And T.Â. Luchese. *Educar para a catolicidade e a italianidade: o jornal Il Corriere D'Itália, RS, Brasil (1913-1927)*, in T.R. de Luca, V. dos S. Guimarães (edd.), *Imprensa estrangeira publicada no Brasil. Primeiras incursões*, São Paulo, Rafael Copetti Editor, 2017, Vol. 1, pp. 283-329, besides «A Federação», the most important publication connected to the Rio Grande do Sul government of that time.

[5] For other commemorations consult A. Barausse, T.Â. Luchese, *Education, ethnic identity, and memory in the Italian ethnic schools of South Rio Grande (1875-1902)*, «Paedagogica Historica», vol. 54, n. 6, 2018, pp. 720-735.

[6] A recurrent term used in the press and in the speeches give over 1924-1926 regarding the 50th Anniversary.

[7] Luigi Arduini was born in Rimini on October 21, 1887 and died in the same city on January

context was very problematic because of the revolutions that broke out in 1923 with consequences in all areas. Even when faced with the internal tensions experienced by Rio Grande do Sul society, and the signs of a state of crisis, the role of the Italian community began to have an innovative value, even in its political nature, directed at supporting the bases of the young Republican state in which, as the consul pointed out, about 300,000 immigrants and their descendants now lived[8]. While the Brazilian Italian community celebrated its first fifty years in the country, in Italy the State underwent a totalitarian change[9].

The event that celebrated the 50th anniversary took place at the beginning of the totalitarian fascist regime, two decades during which the space of celebrations of anniversaries in Italy gradually grew. The purpose of the celebrations was to influence the identity process of the Italians and they were already being utilized since the end of the 19th century, but some were abolished and, above all, they began to be used constantly by Fascism almost obsessively in order to influence collective memory more effectively. Therefore, in October the exploits of the March on Rome were remembered, but ample space was also given to May 24, the celebration of the Declaration of War. Further, on November 4, the anniversary of victory, on April 21 of Chrismas in Rome, on May 9 the anniversary of founding the Empire. Celebrations in schools were flanked by other traditional dates of the party or the Statutes. But some were abolished, such as September 20, at the end of the Twenties. The commemorations can be thought of from the perspective of intended traditions that «include both the 'traditions' that were actually invented, constructed and formally institutionalized, and those that arose in a manner which is more difficult to locate in a limited and given time period […] and were established

1, 1962. He was the son of Aurelio and Maria Carmela Vitali. He married Luisa Ripa in 1933, in Rimini and had a son, Aurelio. He graduated in Law from the University of Rome on July 12, 1910, and also in Political Sciences from the University of Geneva on July 13, 1911. On July 31, 1912, after an exam, he was appointed consular functionary and worked at the Ministry of Foreign Relations. In 1913 he was sent to Constantinople, and was promoted to vice-consul. In 1915 he returned to work in the Ministry. On February 1, 1947 he retired. See further in Università di Lecce, *La formazione della diplomazia nazionale (1861-1915). Repertorio bio bibliográfico dei funzionari del Ministero degli Affari Esteri*, Rome, Istituto Poligrafico e Zecca dello Stato, 1987, p. 22.

[8] Consul Arduini, when informing the Ministry about the data, did not hide the difficulty in obtaining reliable information.

[9] About Fascism and the emmigrants/imigrants, see E. Franzina, M. Sanfilippo, *Il fascismo e gli emigrati. La parabola dei fasci itaiani all'estero*, Rome, Laterza 2003. For the Brazilian and Rio Grande do Sul context, J.F. Bertonha, *O fascismo e os imigrantes italianos na Brasil*. 2ª edição rev. e amp. Porto Alegre, Editora da PUCRS, 2017 e L.S. Giron, *As sombras do littorio. O fascismo no Rio Grande do Sul*, 2ª ed. Caxias do Sul, RS, EDUCS, 2017. Regarding schools, see A. Barausse, T.Â. Luchese, *Nationalisms and schooling: between italianity and brazility, disputes in the education of italian-gaucho people (RS, Brazil, 1930-1945)*, «History of Education & Children's Literature», vol. XII, 2, 2017, pp. 443-475. Further, A. Barausse, *I libri scolastici come strumenti di promozione dell'identitá nazionale italiana in Brasile nei primi anni del fascismo (1922-1925)*, in «História da Educação», vol. 20, n. 49, 2016, pp. 81-94.

very fast»[10]. It appears to have been the case of the fascist commemorations in Italy, but those produced with the festivities of the 50th Anniversary of Italian Immigration in Rio Grande do Sul also bore fruit.

The planning of the commemorations of the 50th Anniversary in Rio Grande Sul was intensely reported in the Rio Grande do Sul press. The first meetings, beginning in July 1924, sought to establish the lines of what they would do, how they would celebrate, what the 50th Aniversity festivities would be. In November 1924, the movements to organize the celebrations of the 50th Anniversary that would take place during 1925 were set and a provisory committee was established, consisting of Cav. Giovanni Campelli[11] as chairman and as vice-chairmen: Carlo Lubisco, Dr. Albertini, Cesare Scarani[12], Celeste Gobatto, besides Attilio Marsiaj as treasurer and Benvenutto Crocetta and Ferruccio Targa as secretaries. The committee proposed to «show the host country, the other foreign collectivities that interact and the country's authorities all our capacities, whose fair value is not always appreciated and is sometimes unknown or ignored»[13]. Gradually they define the intention of implementing the celebration with three events: 1) Exhibition or Show of the work done by Italians, to be held in Porto Alegre; 2) Inauguration of a memorial in marble or a commemorative plaque; 3) Publication of a monography on Italian colonization in Rio Grande do Sul[14]. Further meetings helped define the program and establish an organization.

The practically definitive program would comprise: (1) Exhibition or Show of Work, in October 1925, presenting the branches of activities to which the Italians in Rio Grande do Sul dedicated themselves: agriculture, trade, industry, art; (2) inauguration of a monument in marble or a commemorative plaque;

10 E. Hobsbawm, *Introdução A Invenção das Tradições*, in E. Hobsbawm, T. Ranger (edd.), *A Invenção das tradições*, 3ª ed. Rio de Janeiro, Paz e Terra, 2002, p. 9.

11 Campelli was a physician, and like him several others became involved in the commemorations. «Several physicians held important positions on the Committees that organized the commemorations of the 50th Anniversary of Italian immigration. Outstanding are Giovanni Campelli, general chairman who promoted the mixed Italian-Brazilian committee and Lourenço Cichero, chairman of the committee for the monography of the respective album. Enzo Salaroli, Domenico Oss and Vicente Bornancini were the chairmen of the respective committees of Santo Ângelo, São Luiz da Casca and Caxias» (L.C.B. Schwartsmann, *Entre a mobilidade e as inovações. A presença dos médicos italianos no RS (1892-1938)*, Tese em História. Porto Alegre, RS: PUC/RS, 2013, p. 234.

12 Director of the agency of the Banco Francês e Italiano in Porto Alegre, according to the *O Cincoentenario da Colonisação Italiana no Rio Grande do Sul. O programma dos festejos comemorativos do Comitato Coloniale com sede central e Porto Alegre. A formação dos Comitatos Municipaes e Sub-Comitatos Districtaes no Interior do Estado*, «A Federação», vol. XLII, n. 14, 16 January, 1925, p. 1.

13 *Corriere dello Stato. Comitato Dante Alighieri Porto Alegre. Per la commemorazione del Cinquantenario della Colonizzazione Italiana nel Rio Grande del Sud*, «Staffetta Riograndense», XVI, n. 27, 5 November 1924, p. 1.

14 *Commemorazione del Cinquantenario della Colonizzazione Italiana nel Rio Grande do Sul*, «Staffetta Riograndense», XVI, n. 38, 21 January 1925, p. 1.

(3) publication of a monography on Italian colonization in Rio Grande do Sul, from 1835 onwards, subdivided into: (a) historical scenes; (b) history of the first Italian immigrants; (c) individual and collective celebrities; (d) schools, societies, religious missions, journalism, soldiers, workers, artists; (e) current distribution of the Italians in Rio Grande do Sul; (f) colonization system; (g) study of the natural environment, climate and terrain; (h) agricultural, commercial and industrial conditions, and development of the state and Italian cooperation; (i) importance of the Italian colonization for the development of the State; (j) possibilities offered by Rio Grande do Sul for new immigrations; (k) conclusion. It was also informed that the costs to hold these commemorative activities would be defrayed from the mutual aid associations, with donations[15] from businesses, government and consulate, through Cav. Luigi Arduini. The story informed that all commemorations would be presented to the Italian Ambassador in Brazil, General Pietro Badoglio. Commemorations in the municipalities were also encouraged and carried out during 1925[16].

Following this, at a new meeting at Confeitaria Rocco (a traditional confectioner's) in Porto Alegre, with the participation of Consul Luigi Arduini, the committee chairman Giovanni Campelli and many other 'illustrious' representatives of the Italian colony in Rio Grande do Sul, began to organize the festivities. The consul emphasized that they could not be less significant than those that had been celebrated by the Germans in the state. It was announced that they had received 70 contos de reis (70 thousand of the Brazilian currency in those days) and, according to Campelli, considering almost all the immigrants and descendants as Catholic, found it fair to donate part of the amount already received to finish the construction of the Metropolitan Cathedral. At the time, they took up again the composition of the committee that was defined with the following participants: Chairman Giovanni Campelli, vice-chairmen: Carlo Lubisco, Cesare Scarani, Alberto Albertizi, Celeste Gobbato, Lorenzo Cichero, Duilo Bernardi, Augusto Sartori and Luiz Michelon. The secretaries appointed were Benvenutto Crocetta and Ferrucio Targa, besides Attílio Marsiaj and Pietro Bonotto as treasurers. Local committees[17] were also organized in several

[15] The names and amount donated are published in the newspapers.

[16] *Corriere dello Stato. Comitato Dante Alighieri Porto Alegre. Per la commemorazione del Cinquantenario della Colonizzazione Italiana nel Rio Grande del Sud*, «Staffetta Riograndense», vol. XVI, n. 27, November 5, 1924, p. 1.

[17] The committee of the municipality of Caxias was constituted by Luigi Arduini (cônsul), Celeste Gobbato (mayor), Vico Barbieri (physician) and Father Giovanni Meneguzzi – all of them considered honorary chairmen. Aristides Germani was acclaimed chairman of the committee, Dr. Felice Spinato, Mario Caorsi, Vicenzo Bornancini, Leonel Mosela, Adelino Sassi, Angelo Antonello and Coronel Tancredo Feijó vice-chairmen, Galeazzo Paranelli and Fulvio Minghelli treasurers and Mauricio Viola, Bruno Battocchio and Dante Marcucci secretaries (*Caxias per il Cinquantenario*, «Staffetta Riograndense», vol. XVI, n. 40, 4 February 1925, p. 2). The committee of the municipality of Garibaldi was constituted by Ce. Jacob Nicolao Ely (mayor) and Antonio Paganelli (vice-mayor) as honorary chairmen, Father. Gentile as actual chairman, Battista Mottin

municipalities in the interior[18]. The organization consisted of replicating the structure of the committee in the municipalities, and the sub-committee in the districts, the structure of the committee, and in the districts the sub-committees. There was a network of people involved in the festivities, besides many others who participated in the meetings that occurred generally at the Mutual Aid Associations or even at the main offices of the municipal city councils.

In this environment, the commemorations of the 50th anniversary of the Italian presence were planned. It was the first great statement of ethnic identity promoted more collectively by immigrants and descendants from the Italians. The colonial committee was sponsored by the President of the State of Rio Grande do Sul (the title given to the State Governors in those days), Borges de Medeiros, and the honorary chairmanship was offered to the Italian ambassador Pietro Badoglio, who, however, would soon give up the position to Baron Giulio Cesare Montagna[19].

as vice-chairman, Ettore Mazzini as secretary, Enrico Grossi as vice-secretary, Dante Toniazzi as treasurer and Arduíno D'Arrigo as vice-treasurer. The publicity committee was formed by Father Camillo, Ambroglio Toniazzi, Giovanni Tonin, Andrea Mottin, Antonio Berto, Ruggero Casacurta, Augusto Toniazzi, Primo Franceschini, Vicenzo Faraon, Vicenzo Confra, Ercole Doglia, Luigi Faraon, Giuseppe Valmorbida, Angelo Paganelli. Further, the municipality had the sub-committee of the district of Carlos Barbosa. The honorary chairmen of the municipal committee of Alfredo Chaves [now Veranópolis] were Sigismundo Rescke, acting vice-mayor and Father José from Bento Gonçalves, Vicar. As chairman proper Giovanni Antoniolli, Guido Cavedon as secretary, Rovílio Dal Pai as treasurer and the entire managing board of the Prince of Piedmong Italian Society as full members. In the municipal council of Prata [now Nova Prata] the honorary chairman was the municipal mayor, Engel Filho, the chairman proper was the Vicar, Father Giuseppe Sanson, Raffaele Cherubini was the treasurer, the secretary was Giuseppe. Antônio Prado had the mayor, Caetano Reginatto and Canon José Benin as honorary chairmen. Vicente Palombini as chairman proper, Narcisio Barison as vice-chairman, Father Angelo and Pedro Collari as 1st and 2nd secretaries and Domingos Grazziotin and Maximo Settios as 1st and 2nd treasurers, besides other collaborators (*O cinquantenario da colonização italiana*, «A Federação», vol. XLII, n. 87, 13 April 1925, p. 5). In Anta Gorda the following were elected: Father Herminio Catelli (honorary chairman), Benvenutto Fornari (chairman proper), Giovanni Simon Sobrinho (vice-chairman), Angelo Simon (treasurer), Ulderico Fava (vice-treasurer) and Carlo Moro (secretary) (*Anta Gorda. Per il Cinquantenario*, «Staffetta Riograndense», vol. XVII, n. 9, 1 July 1925, p. 2). In Passo Fundo, the honorary chairmen were Araújo Vergueiro, Armando Annes and Giacomo Gabiani, and the president proper was Florencio Della Mea (*Cinquantenario*, «Staffetta Riograndense», vol. XVII, n. 2, 13 May 1925, p. 1). In São Borja the committee consisted of Italo Drago (chairman), Carlos Drago (vice-chairman), Antônio Schiavo (secretary), Frederico Bonetti(treasurer) and councillors José Maragno, Pedro de Matteo, Cesare Pittoni, Antonio Vitale, Abramo Sandri and Mario de Matteo. (*Cincoentenario da imigração italiana*, «A Federação», vol. XLII, n. 185, 11 August 1925, p. 05).

18 *Cinquantenario della colonizzazione itaiana*, «Staffetta Riograndense», vol. XVI, n. 29, 19 November 1924, p. 1.

19 Giulio Cesare Montagna was born on August 4, 1874 in Rome, the son of Francisco and Paola Galluppi. He died on December 20, 1953 in Naples. He graduated from Law School at the University of Rom in July 1897. On March 27, 1899, after an exam, he was appointed, and over the years he held Ministry positions in various cities/countries: Madrid, Monaco, London, Washington, Mexico City, Teheran, Persia and in Brazil. In 1927 he retired as ambassador. See further in Università di Lecce, *La formazione della diplomazia nazionale (1861-1915). Repertorio bio bibliográfico dei funzionari del Ministero degli Affari Esteri*, cit., p. 513.

The significant Italian institutional participation actually emerged from the discontented reactions aroused within the Italian immigrant collectivity. In a report about the centennial of the German colonization, Consul Arduini aimed much criticism at the governments responsible, in his opinion, for having abandoned the Italian communities that deserved similar attention to that given by the German government to its communities. In their words «the work done by the Italians in the State for only fifty years is equal, if not superior, to that performed by the Germans, as acknowledged by the Brazilians themselves and other foreigners»[20]. The disillusionment that arose among the representatives of Italian emigration, after the visit of Giuseppe Mastromattei, vice-commissioner general in the South of Brazil, was suspended led consul Arduini to suggest that the great support to the celebration of the 50th Anniversary was an act to making amends. The festivities must be «very solemn, giving our compatriots the impression of their strength and to the autochthonous element the proof of the moral, intellectual and physical value of our emigration»[21]. For this purpose, the organization of the 50th anniversary foresaw holding an exhibition of the work done by Italians that «by the number and importance of the exhibiting businesses, by the wealth and variety in the pavillions, by the recreation and amusements attached and by the presence of the public it is hoped that a truly record number of visitor will be attained»[22].

The initiative was important because of the representation that the immigrants and descendants of Italians intended to offer their own ethnic group. The celebrations would include a trip to the main centers of colonization in the interior of the state (Caxias, Bento Gonçalves, Garibaldi) and the unveiling of several memorial stones and monuments, including a monument in Nova Milano, at that time a small district of Caxias[23] where the settlers arrived in the winter of 1875. In the memorandum prepared by the General Authority for the ministers, it was emphatically emphasized how the development of Rio Grande do Sul was connected to the work of the settlers, described as hard-working, silent and fruitful, which had allowed attaining a high degree of civlization and well-being in the last fifty years[24]. The government, invited by the organizing committee, decided to intervene through the ambassador's representation. «The Royal government gives special importance to the commemoration, which will have to be very solemn, to give our compatriots the impression of their strength

[20] Arduini Report of April 8, 1925, ASMAE, F. Affari Commerciali 1924-1926, b. Brasile Pos. 25-54, f. Centenario della colonizzazione tedesca. Porto Alegre.

[21] Report by Consul Arduini of april 20, 1925, ASMAE, F. Affari Commerciali 1924-1926, b. Brasile pos. 25-54, f. *Cinquantenario della colonizzazione italiana a Porto Alegre*.

[22] *Ibid*.

[23] Currently belonging to the municipality of Farroupilha.

[24] Report to Minister [from G. Chiostri], June 2, 1925, ASMAE, F. Affari Commerciali 1924-1926, b. Brasile pos. 25-54, f. *Cinquantenario della colonizzazione italiana a Porto Alegre*.

and to Brazilians a renewed view of the high moral, intellectual and economic value of our emigration».

The mobilization of committees in the municipalities and raising the awareness of the descendants were seen as essential to implement the Colonial Committee's plans. Meetings were permeated by speeches given by the Consul or consular agents, local public authorities, representatives of mutual aid associations, teachers, and especially priests. The celebration of the 50th Anniversary had strong support from many Italian priests who – in the capital and in the interior – accompanied the immigrants and their descendants. They were important mediators who raised people's awareness, sensitized them to the construction of the representation of an ideal Italian, be they farmer, tradesman or industrialist, but fervorously Catholic, who progressed through work, remaining orderly and peaceful.

It is relevant to note that Consul Arduini was constantly present in the visits undertaken to the many municipalities where there were immigrants and their descendants during the first months of 1925. The intention of the visits was to disseminate the purpose of the commemoration, raising awareness in the communities, raising funds through donations received from industrialists, business people and other professionals, besides donations from the municipal government[25]. The presence of schools, as well as that of Mutual Aid Associations is recurrently mentioned when receiving the visitors. For instance, on April 26, 1924 Consul Luigi Arduini arrived in Alfredo Chaves, and was «solemnly received at the entrance to the village. He was met with many banners by the São Luís and São José Escolar schools, the Seraphic Seminary, the "Lyra Independente" band, the Prince of Piedmont Society, civilian and ecclesiastical authorities and many of the local population»[26]. Between the speeches exalting the importance of the 50th Anniversary, the Consul visited the Church where a celebration was held. On April 27, the Consul visited São José and São Luis School, at which time he «encouraged teachers to teach both the Portuguese and the Italian language»[27]. He then went on to visit the seminary and several commercial and industrial establishments. The visit culminated in a banquet and further speeches exalting the patriotism and heroism of the first immigrants, emphasizing the importance of celebrating the 50th Anniversary.

The festivities were important to construct representations around the work jubilee», exalting the Italian traditions, underscoring the «industriousness and civil progress» that the presence of the «pioneers» who immigrated from the Italian peninsula had achieved and promoted in the lands of Rio Grande do Sul. We know that identity processes are constructed and renewed in everyday

[25] We found the records of donations by Municipal Mayor to the 50th Anniversary Committee. For instance, we may mention the case of Caxias, Bento Gonçalves, Garibaldi and Antônio Prado.

[26] *Alfredo Chaves. Visita del Console*, «Staffetta Riograndense», vol. XVII, n. 1, 6 May 1925, p. 2.

[27] *Ibid*.

experiences, underscoring differences. We spell out some of the festivities of the 50th Anniversary thinking of them as builders of the myth of the Italian immigrant.

2. *«Cinquant'anni di sudori fecondi, di lavoro costante e di continuo progresso»*[28]: *the 50th anniversary festivities*

The 50th Anniversary commemorations were extended to each of the municipalities in which descendants of Italian immigrants were present: fireworks, an open-air mass, followed by lunch, generally a barbecue, the speeches of local authorities and shows were a recurrent program. There were also civic parades, with the presence of schoolchildren singing anthems, reciting poetry and many speeches by different authorities which are found in regional and Italian newspapers, as well as correspondence by consular and municipal authorities. These were «manifestations of love, of esteem for the nationality», exalting the Motherland and the «industrious immigrants». The inauguration of stones and monuments and their constitution as «memory places»[29] were a visible fact at the celebrations and every time plaques and monuments were unveiled, there were the schoolchildren and their teachers, following and participating in the event. In the summary table below, we present a summary of some of the festivities that took place:

Summary Table 1. Some of the 50th Anniversary festivities in the municipalities

Municipality	Date	Main commemorations
Porto Alegre	December 1925	Reception of ambassador Montagna on December 3, 1925. On December 12, 1926 – 8:30 am – Open-air mass charging 1$000 from each participant, This money was donated to build the Metropolitan Cathedral. In the evening, in the Exhibition Hall, Lilac Ball, promoted by the ladies' section of Dante Alighieri.

[28] *Cinquenta anos de suores fecundos, trabalho constante e de contínuo progresso* was the title of the long news article published by the «Staffetta Riograndense» newspaper on December 16, 1925 reporting on the celebration of the 50th Anniversary, exalting the work done by Italians in Rio Grande do Sul.

[29] P. Nora, *Entre memória e história. A problemática dos lugares*, «*Projeto História*», vol. 10, jul/dic. 1993, pp. 7-28.

Porto Alegre	December 1925	Agricultural-Industrial Exhibition commemorating the 50th Anniversary, organized by the Colonial Committee on December 5-22,1925. Awards for the best products shown according to category[30] Festive dinners and lunches, together with many cultural activities (movies, theater, musical shows) were also offered.
Anta Gorda / Encantado	September 20, 1925	In the morning – festive reveille accompanied by the musical band. Then a procession, carrying the Italian and Brazilian flag, ato the place where the open-air mass was held. At midday, 'big' barbecue (*Churrasco*), followed by speeches that «revived the splendor of Italian colonization in the state of Rio Grande do Sul, exalting the civilian, moral and material virtues, and ending with a salutation to Brazil, the adopted homeland»[31].
Vista Alegre (Prata)	October 29, 1925	The festivity began with a mass, celebration of the First Communion of one hundred children and a 'beautiful sermon' by the parish priest of Bela Vista, Father Monaco. Fireworks, procession, street decorated with arches, music and barbecue at a large collective lunch. Speeches by the mayor, Felice Engel, followed by Mr. Petinelli and Albina Tarasconi, all of them exalting the industriousness and progress made by the Italian settlers. Finally, Professor Giacomo Dalla Costa highlighted the heroism of the immigrants and the brotherhood among the Italo-Brazilians[32].
Caxias	November 7-9, 1925	First day: festive reveille with mortar fire. Music bands: Santa Cecília and Lyra Independente. Raising the flags of Italy and Brazil, the respective national anthems being sung with the presence of pupils of the following schools: São José, Carmo, José Bonifácio, parish, state and municipal schools. Opening of the Agricultural, Industrial and Artistic Exhibition of Caxias. Speeches. Presentation of an operetta,'La Geisha', in Apolo Theater. Second day: festive reveille. Opening of exhibition, music bands, Long distance races, Presentation of choirs, Open air movie. Ball. Third day: reveille, Opening of Exhibition. Endurance races, Pinhata games. Presentation of "Don Pasticcio", in three acts in Apollo Theater.

[30] In *O cincoentenario da colonisação italiana* the newspaper «A Federação», vol. XLII, n. 298 published on December 23, 1925, p. 3, there is a list of those who received gold, silver, bronze medals and honorable mentions.

[31] *Anta Gorda Encantado. Cinquantenario della colonizzazione italiana nello Stato del Rio Grande do Sul*, «Staffetta Riograndense», vol. XVII, n. 25, 21 October 1925, p. 2.

[32] *Vista Alegre. Municipio del Prata*, «Staffetta Riograndense», vol. XVII, n. 30, 25 November 1925, p. 2.

Santa Rosa	November 28-29, 1925	Inauguration of bronze monument in honor of Christopher Columbus, It was wrapped in the Brazilian and Italian flags. Speeches and the National Anthem and Italian Royal March were played. Open air mass. Presence of 3 music bands and festivities throughout two days[33].
Bento Gonçalves	December 8, 1925	Presence of Ambassador Baron Montagna and of the Provincial President, Borges de Medeiros. Visit to the office of the Regina Margherita Mutual Aid Society; Speeches, Te Deum in the Parish Church, Banquet at Aliança Club.
Garibaldi	December 8, 1925	Presence of Ambassador Baron Montagna and the Provincial President, Borges de Medeiros. Speeches. Visit to Schools, Banquet.
	December 12, 1925 December 13, 1925	Festive shots. Ringing the Church bells, and a novena. Fireworks. Solemn sung mass. Inauguration of commemorative plaque. Barbecue. Speeches, Music band to liven up the proceedings. Theater play. 8 pm – free movie[34].
	December 31,1925	Celebration of mass in memory of the immigrants who had already died.
Coronel Gervásio (Tapera)	December 19,1925 December 20, 1925	Fireworks. Music band Aurora conducted by maestro Fernandes do Pilar, followed by open air mass officiated by Father Luigi Strippoli. Then a barbecue was served. The Aurora band, accompanied by a group of unmarried ladies, sang several patriotic anthems. At 3 pm, on the city square, the bust of Dante Alighieri was inaugurated as a monument to recall the 50th Anniversary. Then speeches were made, and the Brazilian National Anthem and Fascist anthem were sung, besides movies and balloons. The next day an auction was held[35].
Mussum (Guaporé)	-	Inauguration of monument honoring Christopher Columbus. The statue had been ordered from Italy by Father Luiz Segale.

Source: organized by the authors.

It is clear that many festivities were held. Besides those spelled out in the previous summary table, many others occurred in the interior, with developments throughout the year of 1927. Caxias, «the pearl of the Italian colonies», a nickname bestowed by the provincial president,, Júlio de Castilhos,

33 *O cincoentenario da colonização italiana*, «A Federação», vol. XLII, n. 296, 21 December 1925, p. 19.

34 *Cinquantenario della Colonizzazione Italiana in Garibaldi*, «Staffetta Riograndense», vol. XVII, n. 31, 2 December 1925, p. 2.

35 *Coronel Gervasio (Taopera). Echi del Cinquantenario*, «Staffetta Riograndense», vol. XVII, n. 41, 10 February 1926, p. 2.

in 1897 and at the time of the commemorations administrated by the Italian agronomist Celeste Gobatto[36], besides the capital, was the municipality that commemorated the 50th Anniversary most intensely. In the opening speech of the Exhibition, mayor Celeste Gobbato said:

> Today Caxias is greatly honored to open the festivities commemorating the 50th Anniversary of Italian immigration in Rio Grande do Sul. And, that had to happen, because Caxias, has never faltered in fulfilling its duties of civics and gratitude. It had the holy obligation of glorifying the courageous pioneers of its origin, its foundation and its current and extraordinary development. Fifty years ago the territory of our municipality received the gallant group of Italians offering them very little shelter, but providing them, besides fraternal love with the possibility of a future that became real for those who persisted in the hard struggles and found comfort in the immeasurable application of many different jobs. Today, Caxias is full of smokestacks and buildings that show its industrial strength, interspersed with hills covered by opulent vineyards and the fruit of very intense and very varied agricultural work, which is the best indicator of its highly important polyculture: today Caxias, in the work festival, a precursor of the most important commemorations and where it presents the summary of its activitiy, in this way expresses its immense gratitude to the men who began to arrive here fifty years ago, and attributes to them the liveliest and most beautiful aspects of the human soul for everything they did in benefit and in honor of this territory in our beloved Rio Grande do Sul, and for the greater closeness of the friendship between the two great Latin nations: Italy and Brazil! […] I thank the schools and associations that are present here […][37].

The speech by Gobatto and by other authorities present at the opening of the exhibition was heard by many people and also by schoolchildren. This is emphasized in his speech. In pic. 1 is the photographic record of the presence of the schoolchildren.

Carrying Italian and Brazilian banners, wearing their best clothes, the schoolchildren participated actively in the commemorations. In the previous picture, the banner hanging at the entrance to the exhibition hall read «From current society to the heroic pioneers of the past». The exhibition of industrial, agricultural and artistic products of Caxias included products from various municipalities of the Rio Grande do Sul mountain region, and also the arts and crafts produced by schoolchildren, according to pic. 2.

[36] About Gobbatto, consult K. Monteiro, *Entre o vinho e a política. Uma biografia de Celeste Gobbato (1890 – 1958)*, Caxias do Sul, RS, EDUCS, 2016. Ebook available at <https://www.ucs.br/site/midia/arquivos/ebook-entre-o-vinho.pdf acesso em 01/02/2018>. Regarding Gobbato's performance in the municipal administration and education, see T.Â. Luchese, *Expanding schools, increasing attendance, valuing agriculture: Celeste Gobbato and municipal education (Caxias do Sul, RS, 1924-1928)*, «Cadernos de História da Educação», vol. 18, n. 1, jan./apr. 2019, pp. 43-68.

[37] Speech by the Mayor of Caxias, Celeste Gobbato, when the commemorative exhibition of the 50th anniversary of Italian Immigration in Caxias do Sul was inaugurated, Batch 24, Arquivo Histórico Municipal João Spadari Adami.

Pic. 1. Participation of schoolchildren in the inauguration of the exhibition commemorating the 50th Anniversary of Italian Colonization at the facilities of the 9th Battalion of Caxias do Sul, in November 1925

Source: Photograph taken by Studio Geremia, collection of the Municipal Historical Archive (Arquivo Histórico Municipal João Spadari Adami)

Dishcloths, tablecloths, pictures, cushions, serviettes and handkerchiefs produced using different materials and techniques were shown, besides wooden objects. They were the result of the arts and crafts developed at the school. Small flags of Italy and Brazil were placed on the tables side by side.

Besides the Exhibition in Caxias, masses were officiated, several arts and sports activities were held, festive lunches and dinners, besides the inauguration of the obelisk in Nova Milano and another monument in the recently founded Fiftieth Anniversary Park (Parque Cinquentenário)[38].

Celeste Gobbatto, as well as Consul Arduini himself, sent letters to several mayors of Italian cities such as Venice, Milan, Vicenza, Cremona referring to the festivities of the Fiftieth Anniversary and requesting their support, since they were 'connected by name and ancestry' to those municipalities. Among the answers he received, in September 1925, was the message from the Senator and Mayor of Milan, Mangiagalli. Besides the greetings he stated that «profound,

[38] The Park still exists and still has the same name given at the time.

Pic. 2. Arts and crafts by female schoolchildren of the Elementary School at the commemorative exhibition commemorating the 50th Anniversary of the Italian Colonization at the facilities of the 9th battalion of Caxias do Sul, in November 1925

Source: Pohotograph by Studio Geremia, collection of Arquivo Histórico Municipal João Spadari Adami

almost invisible bonds – which therefore are sometimes not understood by someone who does not feel the grandeur of the name and Latin race – these connect the Italians here to those overseas»[39] and this is how the connections were established. In October 1925 there was a letter from A. Franceschini of Vicenza. In this letter Franceschini informed that the fascist women «were preparing for Nova Vicenza an ensign with the colors of our city» that would be sent via Aristides Germani[40] who was in Italy and had already been contacted by Mangiagalli. Other donations also appear to have been sent[41].

[39] *Cinquantenario. Un vibrante messaggio agli italiani del Rio Grande*, «Staffetta Riograndense», vol. XVII, n. 21, 23 September 1925, p. 1.

[40] On June 20, 1925, the «Correio Colonial» published a note *Viajantes* informing that Aristides Germani and wife had left for Italy on June 15, 1925. It added that on June 26, 1925, Benvenuto Ronca and wife, besides Angerlo de Carli, wife and three children would also be travelling. *Viajantes*, «Correio Colonial», vol. 1, n. 26, 20 June 1925, p. 2.

[41] *Colonisazione italiana. I festeggi del Cinquantenario*, «Correio Colonial», vol. 1, 10 October 1925, p. 5.

The symbolic constructs connected to the festivities had a commemorative anthem, composed by Liberalli, as presented below:

Tab. 1 Anthem commemorating the Fiftieth Anniversary of Italian Immigration in Rio Grande do Sul[42]

Transcript of words of The 50th Anniversary Anthem	50th Anniversary Anthem
Inno del Cinquentenário	Hino do Cinquentenário
Dall'Italia un di siamo partiti Per venir al Brasil habitar Onde I figli che al mondo alleviamo Largamente poter sostentar. Coro O fratelli venite e cantiamo: Messo secolo ormai già passò Da quell giorno che il primo italiano Nel Rio Grande il suo piede poso E pur vero che abbiamo sofferto In principio, sul nostro arrivar; E pur vêro che I boschi selvaggi Spesso fecer la fronte sudar. Ma passate cinquanta invernate Delle pene patite godiamo; Col lavoro accanito e costante Nova Patria in America abbiam. E la patria che, immense, ci alberga Non è quella del dover meschin Che in Italia lavora, lavora, Senza aver mai in tasca um quattrin. Nel Brasil non vi son padroni Ognun qui è padrone di sè: In sua casa il colono comanda E si stima l'eguale d'un rè. Cinquant'anni di vita e lavoro Tutti insieme dobbiam ricordar! Il valor della stirpe italiana Con impegno vogliam festeggiar? Liberali.	One day we left Italy To come to live in Brazil Where we can generously support The children that we brought to life. Choir My brethren come and let us sing: Half a century has already gone by Since the day the first Italian Set foot in Rio Grande And it is true that we suffered In the beginning, when we arrived; And it is true that wild forests Often brought sweat to our brows. But now that fifty winters have gone by We appreciate the pains we suffered; With ferocious and constant work We now have a new Homeland in America. And the immense country that hosts us It not that of miserly duty Who works in Italy, works, Never have a single coin in their pocket. In Brazil there are no bosses Everyone here is his own boss: In his own home it is the colonist who gives the orders And has the self-esteem of a king. Fifty years of life and work All together we must remember! How about celebrating the value of the Italian lineage with commitment? Liberali.

[42] *Inno del Cinquantenario*, «Staffetta Riograndense», vol. XVII, n. 33, 16 December 1925, p. 1.

Lauding the immigrants' heroism, and how they prevailed through work, the words of the anthem were in accordance with the ensemble of representations that it was desired to disseminate. It should be acknowledged that the Catholic bias was strongly reinforced throughout the preparations and also during the festivities. As an example, the editorial of December 9, 1924, of the Staffeta Riograndense emphasized that:

[…] understanding whence comes, mostly, the valor of the Italian race, whence comes the constant victorious work that produces so much trade, and whence amid so many problems comes the rapid increase of the Italian population… Is this not the clearest and most certain thing? It come from their religious spirit, led by the priests and Catholic schools, it codes and Gospel, morals and the Ten Commandments. The Italian people, the Italian settler is essentially Catholic, follows the Catholic law, follows the precepts of the Commandments, obeys the requirements of the religious service, carries out the sacrifices imposed by law and when, through human weakness they fall, accepts and listens to the voice of the priest who teaches, who directs, who brings him back to order[43].

The 'trials and tribulations' met with work and faith showed that the 'triumphant virtue of the Italian race' prevailed over the hard life and trials, and that it was possible to make progress. Thus, idealizing their life experiences, the representations around the foundational myth of the history of Italian immigration and colonization in Rio Grande do Sul was gradually constructed. This was helped by the circulation of letters that gained visibility in the newspaper. The message sent by Mussolini, for instance, insists on the identifying traits of the pioneer and the worker:

While you prepare to celebrate the festival of your half a century of fruitful work, I am grateful to tell you that you are amongst the best pioneers of the name and the intelligence and hard-working spirit of the Fatherland and, my great satisfaction as a worker and Italian. In the noble pride that raises your souls while we stop to contemplate the results of the long, tenacious effort, I see the sign of the noble lineage that imprinted an unperishable mark on the history of peoples. As head of the National Government that represents the Fatherland renewed by Victory, I am proud to send my greetings to you who so nobly helped enhance the value of the fertile lands that received you and to forge the friendship between Italy and Brazil[44].

In response, the words of the message that the Committee Chairman, Dr. Giovanni Campelli, physician, sent to Prime Minister Mussolini are significant:

Your message to the individuals and the multitudes dissipated the almost true belief that our Great Mother had, as in the preceding governments, forgotten, or made us coldly disbelieve the love of the Fatherland and of faith. Your message will resonate in the hearts

[43] Editorial *Celebrazione del Cinquantenario. Vi manca però una nota*, «Staffetta Riograndense», vol. XVII, n. 39, 9 December 1925, p. 1.

[44] *Per il Cinquatenario dell'emigrazione italiana nel Rio Grande del Sud*, «Correio Colonial», vol. I, n. 32, 1 August 1925, p. 5. But it was published in other newspapers too, such as «A Federação», «Staffetta Riograndense» and «Il Corriere D'Italia».

of the people of our race, completing the epic of redemption of those souls in whom time, environment and abandonment had created a devastating work of denationalization. Your message tells the Italian colony of Rio Grande what their duty is to correspond worthily to the generous impulse of your heart and to the name and grandeur of Italy and [...] their duty shall be accomplished[45].

The intensification of work done to organize the Agricultural-Industrial Exhibition of Porto Alegre produced negotiations and concessions also from the State Governor, Borges de Medeiros. He granted free railway transport to the products that were to be exhibited, and 50% discounts in the price of the ticket for those who came from the interior to the Capital to visit the Exhibition. Also, the Arnt Navigation Company had granted free river transport from the Upper Taquari river to Porto Alegre. Duilio Bernardi chaired the technical committee responsible for organizing the park in the Menino Deus neighborhood for the exhibition. The wood needed was donated by L. Michelon e Cia, from Erechim. The festivities organized to take place together with the exhibition would offer games, concerts, theaters and other amusements. The preparations for the exhibition also involved the schools. In a note, the press informed that «yesterday, at 9 o'clock, at the Humberto I Society, another rehearsal took place of the children who will be heard during the commemorations»[46]. In several editions, it is possible to find the announcement that said: «Visit the Italian 50th Anniversary Exhibition. Daily, great novelties and 8:30 pm! By the artists of the named *Los Alpinos and Mariucho*. The ticket to visit the Exhibition costs 1$000 and will give one the right to attend the shows, including the movies»[47].

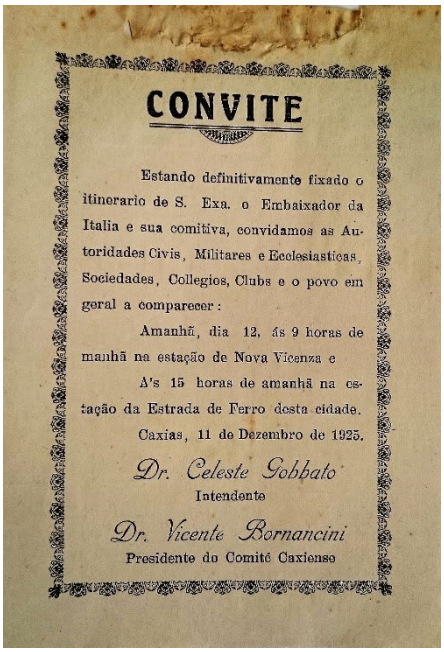
On December 3, 1925, around 3 pm, Baron Giulio Cesare Montagna, the Italian Ambassador to Brazil, arrived in Porto Alegre on board a special train. He was accompanied by a small retinue. He was received with cheers for Italy, for Brazil and for Rio Grande do Sul, acclaimed by many of people present, besides State and municipal authorities, emissaries from various sectors, besides representatives of the 50th Anniversary Committees. After the initial moment, with introductions and official greetings, Ambassador Montagna watched from the main hall of Caminho Novo Station, the parade of representatives of local Italian societies with their ensigns and flags, as well as the march past of the pupils of Umberto I School and of the Italian-Brazilian Dante Alighieri Institute, accompanied by all the teachers, including Professor Menegatti. In a cortege of cars to the Grande Hotel, preceded by the flags of Italy and Brazil, Ambassador Montagna glimpsed the pennants of Italy, Brazil and Rio Grande

[45] *Commemorazione del Cinquantenario*, «Staffetta Riograndense», vol. XVII, n. 15, 12 August 1925, p. 1. «Correio Colonial», vol. 1, 1 July 1925, p. 5.

[46] *O cincoentenario da colonisação italiana*, «A Federação», vol. XLII, n. 201, 31 August 1925, p. 5.

[47] *Visitem a Exposição do cincoentenario Italiano*, «A Federação», vol. XLII, n. 291, 15 December 1925, p. 4; The announcement was published in several editions of the same newspaper.

Pic. 3. Invitation to the 50th Anniversary festivities with the visit of the Italian Ambassador, Baron Montagna



CONVITE

Estando definitivamente fixado o itinerario de S. Exa. o Embaixador da Italia e sua comitiva, convidamos as Autoridades Civis, Militares e Ecclesiasticas, Sociedades, Collegios, Clubs e o povo em geral a comparecer:

Amanhã, dia 12, ás 9 horas de manhã na estação de Nova Vicenza e

A's 15 horas de amanhã na estação da Estrada de Ferro desta cidade.

Caxias, 11 de Dezembro de 1925.

Dr. Celeste Gobbato
Intendente

Dr. Vicente Bornancini
Presidente do Comitê Caxiense

Source: Celeste Gobatto private archive, batchm 25. Arquivo Histórico Municipal João Spadari Adami.

do Sul, hanging from the houses along the way[48]. The ambassador made many visits[49], including to President Borges de Medeiros and, together, on December 5, they inaugurated the Exhibition.

Several newspapers published invitations to the 50th Anniversary festivities on behalf of the Mutual Aid Societies and the Organizing Committee. Notes were published advising those who were interested to reserve rooms to participate. It is said that between December 5 and 16, over 50,000 people had visited the Exhibition.

In the following days, the festivities continued, and they went to the interior, visiting Garibaldi, Bento Gonçalves, Alfredo Chaves and Caxias. The invitation encouraged the schools to be present, as can be seen in Pic. 3.

48 *Chegada do embaixador da Italia*, «A Federação», vol. XLII, n. 281, 3 December 1925, p. 2; *Cincoenta anns de Colonisação Italiana no Rio Grande do Sul*, «A Federação», vol. XLII, n. 281, 3 December 1925, pp. 1 e 2.

49 The Committee offered the ambassador and other authorities a 'lavish banquet' in the party hall of *Confeitaria Rocco*. See *Cincoentenario da Colonisação Italiana*, «A Federação», vol. XLII, n. 289, 12 December 1925, p. 1.

Pic. 4. Pamphlet with Pro-50th Anniversary Poems, December 12, 1925, Caxias

PRO' - CINCOENTENARIO ITALIANO

Italica Gens.

Ao Exmo. Snr. Embaixador Italiano: Barão Julio Cezar Montagna.

O' Raça de heróes! Filhos da Romana Gente,
Que no sangue levaes titanicas proezas:
Levantae alto o labaro, que altas grandezas
Venceu, ao fio de Vosso gladio omnipotente!

Povo de eleitos! Almos sóes da humana mente,
Que as idéas revestis de hellénicas bellezas:
Scintillae no mundo, vós, flammulas accesas,
Baixando a diva luz, benigna, docemente!..

O' Terra Italica! formada do sorriso
Sempre azul, sempre puro do teu grande céu:
E's Tu o jardim, a enfloração dos Continentes;

A clara irradiação das artes refulgentes;
Tu o mais esplendido painel do Paraiso:
A Cáthedra magnifica da Voz de Deus!...

Caxias.

Ao brilhante edil das "Perola das Colonias Italianas": Dr. Celesie Gobbato.

Fulgurante Sacrario do trabalho!
Braço forte da Patria Brasileira:
Oh! faze ouvir a prece do teu malho;
Conta o Progresso em flôr que te embandeira!

De pé. Sôlta tua fulva cabêlleira;
Scismando sob o teu celeste palio;
Pareces uma esguia, verde palmeira,
Mostrando ao sol suas perolas de orvalho..

Ah! quanto és bella, alegre Camponeza,
Vestida de tua italica belleza;
A cantar como as as meigas cotovias...

Sobererana, co' o suor tu te engrinaldas;
Tens as vestes repletas de esmeraldas;
Tens não sei que de grande, alma Caxias!...

AO HUMILDE E GLORIOSO COLONO ITALIANO

O emigrante.

Na clara mansidão do oceano immenso,
Sulcando as aguas, longe da balisa;
Estonteado, o emigrante, além divisa
O saudoso abanar d'um branco lenço...

Vêm da Patria aromáticos incensos,
N'alva neblina, que no mar deslisa...
Sonhos de amor se evolam, com a brisa
Deste adeus tétrico, dorido, extenso...

E emquanto singra a vela a sua carreira,
Na amplidão extrangeira, geme e chora,
Sobre o convez, nostalgico, o emigrante...

E dormindo... e sonhando um Paiz distante,
Dentro da noite vê elle abrir-se a aurora
Do coração da Gente Brasileira..

Terra da Promissão.

Fechado n'alma d'ouro d'esta Terra,
Onde pompéia exuberante a Flóra,
O immigrante, prostrado, admira e adora
O sagrado Eden das primeiras eras...

Scintilla pelo dorso azul das serras
Toda a belleza, que hélio rememora;
E pelos valles brandamente jorra,
Mellifluo, o leite que Israel bebera...

Ergue o pobre sua tenda, ao som das aves,
Que cantam Pyndorama e seus fulgores,
Plasmados no sorriso do seu Povo...

E quando vae puxando os bois suaves,
Vê, além, descortinando os esplendores
Da bizarra opulencia do Paiz Novo...

Caxias, 12 - 12 - 925. *Vico P. Thompson*

Source: Celeste Gobbato private archive. Batch 25. Arquivo Histórico João Spadari Adami, Caxias do Sul, Rio Grande do Sul. Four poems dedicated respectively to the Italian Ambassador (Italica Gens), to Mayor Celeste Gobbato (Caxias), and to the Humble and Glorious Italian Colonist, The Emigrant and Promised Land.

Due to the length of this article, it is not possible to detail the visit of the ambassador to the municipalities in the mountains, those which were formed by the oldest colonies predominantly settled by immigrants from the Italian peninsula, but these were days marked by a great number of rituals, followed closely by the population and by many schoolchildren. Pic. 4 shows the pamphlet produced and distributed on the occasion, with poems that praise the immigrant, their work, their achievements, their faith.

Ambassador Montagna, concluding his visit to Rio Grande do Sul, sent a telegram in which he summarized his impressions in the following terms:

My trip to Rio Grande do Sul achieved its aims, objectively and subjectively. 1st) I found a surprising patriotic spirit among the numerous Italian population; 2nd) I noticed a diffuse awareness of the great work done by the National Government and rise of Italy; 3rd) I found clear signs of admiration for V. E. [Benito Mussolini]; 4th) the excellent economic conditions of those important groups are remarkable. 5th) the intense work of national propaganda has produced results. 6th) I noticed a great enthusiasm for my visit expressed by the Italians in the south of Brazil, but, on the other hand, to maintain this favorable situation, although impaired by material needs and political and environmental circumstances, we need wise vigilance and continuous moral assistance from the Fatherland. The State Authorities were cordial, showing deference to the representative of Italy and are favorable to our co-nationals also from the social and political point of view, and from the standpoint of Italian interests in general[50].

Among the interpretations of the commemorations attention is also to be given to those of Cesare Bompard, a member of the *Italica Gens*[51], that was established in the context of the mountains in Rio Grande do Sul during the first half of the 1920s. Bompard's words reveal the point of view of one of the most committed members of Italian emigration. The inspector of *Italica Gens* did not hide the strong emotion he experienced at the celebration to which he attributed a very precise meaning:

I still feel my soul moved by the turmoil of profound emotions experienced last December at an event that constituted a superb triumph of our race. In the summary of the facts that characterized the triumphant rise of Italy last year, the 50th Anniversary of Italian emigration to this state of Brazil must certainly be counted. No Italian colony so far, I believe, has given

[50] Telegram from the Royal Ambassador Montagna, on December 27, 1925, ASMAE, Affari Políticos, 1919-1930, b. 904, f. Relazioni Politiche.

[51] *Itálica Gens* was a component of the sectors of nationalist Italian Catholicism, that, after the end of World War I was reorganized, proposing, with strong autonomy, to collaborate with the government forces guided to defend the values of national identity. About *Italica Gens*, consult G. Rosoli, *La Federazione Italica Gens e l'emigrazione italiana oltreoceano 1909-1920*, «Il Veltro», n. 1-2, 1990, pp. 87-100; G. Rosoli, *Alfabetizzazione e iniziative educative per gli emigrati tra Otto e Novecento*, in L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, Editricce La Scuola, 1999, pp. 119-144; A. Barausse, *Between religion and nation Italica Gens and the development of ethnical schools and Italian language in Southern Brazil in the early 20th century (1910-1930)*, «Histoy of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 303-337.

such a grandiose show of its Italiannes and the preservation of their ethnic character, as that given by the Italian colony in Rio Grande do Sul. It is not my intention to tell everything that was done, nor am I able to give even an idea of the magnitude of the event that took on truly unexpected proportions. Fifty years ago, on December 24,1875, the first Italian colonists, tired, poor, abandoned by all, were thrown into the virgin forest. On December 5, 1925, they gave everyone a demonstration of impressive force and progress; they gave Italy a demonstration of devotion and affection that nobody could have suspected[52].

The interpretation given by Bompard to the consequences of the great celebration of the 50th Anniversary is significant. And, first of all, those of a political nature. He, as representative of the *Italica Gens*, actually saw in the manifestation of Italian greatness the beginning of a more direct role also in the political life of the state of Rio Grande do Sul:

Let us try to absorb this powerful element, amalgamating it to the others, exploring their precious energies and excellent moral qualities. The State Governor has already promised to include more Italians in the Administration; to give the Italian language and culture the place they deserve. All of this had a certainly positive reflection 'because it enhances the value of our race that carries clearly marked its ethnic characteristics' (precisely because of the forced isolation to which it was subjected) [53].

But what is most emphasized and feared as a consequence is the possible integration or assimilation of the Italians in the social context of the State: «but it may present the grave danger that, with a closer contact with the Brazilian element, the Italians will lose their original character», Thence the need to activate an appropriate strategy to maintain the identity traits intact by means of three actions: organizing trips to Italy, disseminating the culture by means of a greater distribution of books, increasing the role of the clergy and of the religious organizations[54].

In the cultural action, there was also the indication to support the development of the ethnic schools, a fact that was mentioned by Bompard.

Finally, as one of the most significant and lasting actions, the festivities foresaw the production and publication of the 50th Anniversary Album. In this album the representations and identity negotiation are rendered explicit with the appeal to the narrative of the Farroupilha Revolution as the strongest link between Italians and the people of Rio Grande do Sul ('gauchos'). The campaign to enhance the value of the Italian immigrants and their descendants produced negotiations and the figure of Garibaldi was symbolically presented as one of the greatest links between the Motherland, Italy and the *gaúchos*. Prominent personalities of other times, but also leaders of the colonial areas and of the Capital were highlighted on the pages of the 50th Anniversary

[52] Letter from Bompard to Schiaparelli, on January 5th, 1926 in ASMAE, b. 637, f. Porto Alegre.

[53] *Ibid.*

[54] *Ibid.*

Album, representing prosperity, faith, progress and strength that the Italians showed on Rio Grande do Sul soil. The commemorations of the centennial of the Farroupilha Revolution, in a way, renewed and deepened the symbolic representations of the symbol of Garibaldi and also of the hard work and faith of the Italians established in Rio Grande do Sul.

The monography intended to illustrate the origins and progressive development of Italian colonization. The cooperation of the Italians in the civil and economic progress of Rio Grande do Sul was the sub-title of the commemorative album. The index of the original volume, transmitted by Consul Arduini to the Ministry of Foreign Relations was articulated precisely through the idea of outlining the components that had contributed to ensure the development of the Italian presence in Rio Grande do Sul:

Homage to the Italian nationality. Preface. 1- The environment of Rio Grande do Sul. 2- Italians and the Piratini Republic. 3- History of the religious missions. 4- Work done by priests and Italian religious corporations in the education and education of youths in Rio Grande do Sul. 5- Lay schools. 6- First groups of Italian immigrants and current distribution of the Italian element in the State (demographic statistics). 7- Importance of Italian colonization in the civil, ethnic, economic, industrial, agricultural and demographic evolution of the State. 8- Industrial development (metallurgy, tannery, manufacture of wool and silk textiles, hats, etc.) of some centers of Italian colonization in Rio Grande do Sul. 9- Italian influence on the cultural and artistic movement in the State. 10- The possibility offered by Rio Grande do Sul to the new waves of Italian immigration. 11- Railway from Porto Alegre to the Italian colonies (Caxias, Bento Gonçavels). Inaugurations. Annual movement- Passengers and merchandise. 12- The Italian colonist and the Rio Grande do Sul farmer. 13- Creation of new agricultural crops. Development improvement or specialization of food products manufactured with the raw materials of Rio Grande do Sul through the work of Italians and their descendants. Hospitals. 15- Societies and newspapers. 16- Climate, soil and hydrography of Rio Grande do Sul. 17- Sports societies. 18- Various topics. 19- Photographs of colonial life. 20- Illustrated industries. 21- The commercial part[55].

The cover of the monography was chosen in a competition won by professor Giuseppe Gaudesi and the photographs took a few months to be produced by Felippe Comelli and a few assistants who accompanied him through the capital and the interior. After it was published, several announcements appeared selling the book and affirming it as a «splendid souvenir of the 50th Anniversary».

Beginning with the initial planning, the topic of schools and education was set as one of the fundamentals of the compendium. But how was the topic represented? Based on a second slightly modified index – attached to a subsequent report by the Consul on April 20, 1925 – we know that the editors of the chapter on religious schools were responsible for different religious orders and, particularly, Father Giuseppe Foscallo, a Carlist and Reverend Giovanni

[55] Sommario della Monografia *La cooperazione degli Italiani nel progresso civile ed economico del Rio Grande del Sud*, ASMAE, F. Affari Commerciali 1924-1926, b. Brasile pos. 25-54, f. *Cinquantenario della colonizzazione italiana a Porto Alegre*.

Meneguzzi; for the lay schools, however, it was Augusto Menegatti and Giuseppe Battocchio. In the reconstruction performed by the two specialists, attention is called to the first immigrants who contributed to the issue of education: «It was necessary to educate the offspring and the need arose for social or private schools, especially in the less important colonial centers where there were no state schools nor municipal schools»[56].

The album, however, in a few lines disposed of the pioneer experience conducted during the period of the second colonization, that between the end of the Empire and the beginning of the Republic. What are the reasons for this silence? Here we can only present assumptions. In the light of the studies performed in recent years, a very complex geography emerged of the reality of Rio Grande do Sul schools, comprising mainly schools, but also with a clear lack of homogeneity of the material conditions and the didactic-pedagogical directions. The reality that is most represented in the album is urban. The memory of schools also celebrates the teachers. The meritorious. How are these figures represented? Figures of dedicated pioneers moving from country to country. People who, like the teacher couple Vito and Adelina Paradiso, «adapt to a life of deprivation». Generally, the figure of the teacher celebrated was that of a zelous teacher who also made a personal sacrifice. Among these is teacher Camilla Roncoroni. Or in figures who also were consular representatives during the difficult revolutionary period. More than exalting the school, it is the figures of the teachers who are highlighted. In the case of the one who worked in Caxias, Abramo Pezzi:

> I remember kind Abramo Pezzi, one of the first Italian teachers in Caxias. He arrived in Rio Grande from his homeland in 1878. The man from Trento, with an elementary school teacher diploma, after having worked as a laborer as an immediate way to earn a living, from 1879 until the day of his death (1903) ran an excellent school in Caxias, and was also the founder of the Prince of Naples Society. 'Maestro Abramo', as he was generally called, was of a reflective rectitude and beloved by all[57].

The text does not mention complex issues of which many teachers were protagonists, including Abramo Pezzi himself. For instance, during the first years of 1890, the subsidies from the Italian Government were cut, when, faced with the choice to naturalize, they suffered a severe retaliation from the consular authorities. The commemorative album presents an imbalance between the representation of the schools promoted by the religious and those managed by lay teachers.

[56] *Le Scuole*, in B. Crocetta, *Un cinquantennio di vita coloniale. Gli esponenti individuali e collettivi della colônia italiana nel Rio Grande del Sud* in *Cinquantenario della Colonizzazione Italiana nel Rio Grande del Sud 1875 – 1925*, 2ª ed. Porto Alegre, Posenato Arte & Cultura, 2000, Vol. I, p. 398.

[57] *Ibid.*, p. 402.

Thus, it should be recognized that the work became a reference and 'founded' a history of Italian immigration in Rio Grande do Sul. Full of the analytic potential of the representations constructed there, the presence of the book resonated in the identity processes of the descendants of the immigrants.

In December 1926, the newspaper, Staffetta Riograndense published the letters of acknowledgment sent by the mayors of Treviso, Venice and Vicenza, as well as by Minister Luzzaretti on behalf of King Vittorio Emmanuelle III and the Prince of Piedmont to the Organizing Committee, praising the work done for the 50th Anniversary[58]. And one of the most interesting analyses that acknowledges the force of the words recorded in the book was that published in an editorial of the Staffetta Riograndense.

Yes, words vibrate and fly, festivities shine and end, exhibitions glow, charm and end; the people who organize, talk, work […] but disappear from the scene of this world! But works of art, monuments, photos, writings remain for centuries and centuries… And so that there will be a lasting memory of the great 50th Anniversary of the Italian Colonization in Rio Grande Sul, the organizing committee wished, even with a thousand problems, overcoming obstacles, entanglements, bother and disturbances of several kinds, that a book remain, a secure, faithful, permanent proof the of the great celebration of the 50th Anniversary and of the wonderful progress made in these lands by the children of Italy […] At this time, the 50th Anniversary book is open in the hands of all inhabitants of Rio Grande, who have a high consideration, in mind and heart, for the Italian name and its virtue. This book is a monument, such is the breadth of its parts and its perspective, it is like a mirror for the descendants from the Italian race, such is the wealth of its figures. This book is a faithful compendium that demonstrates the agricultural, commercial, industrial, artistic, moral, Catholic religious development of the Italians in Rio Grande. […] As the writings that in a timely manner record history, with the pen we outline with the help of images […] our work chooses an anthem to the beneficial and progressive work of the Italians who reside here and their descendants. […]. But let us open the book and leaf it slowly.Yes, readers of Staffetta, open the monography […] keep it, read it […][59].

The 50th Anniversary Album was exalted encouraging people to purchase it and keep it[60]. And the Colonial Committee, when it ended its work, also sent a diploma of merit[61], like that sent to professor Ludovico Maestri to entities, the

[58] *Comitato coloniale pel Cinquantenario della Colonizzazione italiana nel Rio Grande do Sul*, «Staffetta Riograndense», vol. XVIII, n. 34, 29 December 1926, p. 2.

[59] *Il libro del Cinquantenario. Monumento duraturo*, «Staffetta Riograndense» vol. XVIII, n. 12, June 28, 1926, p. 1.

[60] The careful analysis of the work and its content requires a more profound study that is still to be done under the lenses of contemporary historiography.

[61] For instance, others received a diploma of acknowledgement of the support given to holding the festivities, the case of the «Staffetta Riograndense» newspaper. «50th Anniversary of Italian Colonization. We are very pleased, satisfied and grateful to have received a few days ago the homage of the Central Colonial Committee of Porto Alegre. 1st The book of the 50th anniversary – a magnificent volume that clearly and powerfully shows the wonderful work done by our Italian people in Rio Grande do Sul. 2nd A splendid diploma that the jury of the 50th anniversary exhibition gave *Staffetta* as a title of merit for the help provided, with the press, with publicity and encouraging

press and professionals, acknowledging the support received in the festivities and also for the work produced:

Dear Staffetta, I have the honor of truly thanking the Central Comimittee of the Exhibition of the 50th Anniversary of Italian Colonization in Rio Grande do Sul from the bottom of my heart, for sending me a beautiful diploma of merit as a certificate of reward, consideration and gratitude for my service rendered as a teacher for 36 consecutive years in the different municipalities of this State. Gratefully, with great esteem, I remain, Prof. Ludovico Maestri[62].

The commemorations also resonated throughout 1926, since in Guaporé at the Scalabriniano School, on August 17, 1926, at 4 pm, a ceremony was held to deliver the gold medals received for the arts and crafts shown at the Agricultural-Industrial Exhibition. The guests and pupils of the school were received by the Mother Superior, accompanied by the teachers. Gina Marassotti, a student, and Father José Rizzi, gave speeches and then fraternized with sweets and liqueurs[63]. Like this, other moments related to the commemorations were still held in 1926. But the 50th anniversary and its festivities was to resonate for many decades, also in the schools[64].

Conclusion

The mass migrations that took place at the turn of the 19th to the 20th century are characterized by processes of constructing the tradition and identity processes in which the school took the central role. We believe that the «invention of traditions is essentially a process of formalization and ritualization, characterized by referring to the past, even if only by the imposition of repetition […] complex symbols and rituals are created»[65]. There was a broad range of forms and initiatives by which the local powers and Brazilian politics on the one hand and the Italian ones on the other sought to mediate the identities. The settling of the groups of immigrants in the colonization areas of Rio Grande do Sul (RS) at the end of 1875 was progressively accompanied by the rise of small municipalities bearing the names of the cities of origin, to which here was added the word Nova, meaning New: Nova Roma, Nova Vicenza, Nova

spirits to a very grandiose celebration. To the active Central Committe and the perspicaious jury of the Exhibition, *Staffetta* acknowledges and publicly presents is heartfelt thanks. The Directors» *Cinquantenario della Colonizzazione Italiana*, «Staffetta Riograndense», vol. XVIII, n. 10, 14 July 1926, p. 1.

62 *Capoerinha,* «Staffetta Riograndense», vol. XVIII, n. 18, 8 September 1926, pp. 2-3.

63 *Entrega de uma medalha*, «A Federação», vol. XLIII, n. 188, 18 August 1926, p. 5.

64 It would be useful to look at Y. Cabrera, A. Vinão Frago, J. Meda, *School memories. Historiographical balance and Heuristics perspective*, Alemanha, Springer, 2017.

65 Hobsbawm, *Introdução. A Invenção das Tradições*, cit., p. 12.

Pádua. Further, the resignification of historical personalities such as Christopher Columbus, or recalling the hero «of two worlds», as well as other toponyms that marked the ethnic link. The development of the municipalities produced other identity and celebratory marks of Italian ethnicity with the inauguration of squares and schools, mutual aid associations, clubs and sociability spaces such as chapels and their surroundings in the rural areas. They constituted memory spaces that (re) invented traditions, negotiated customs and ways of life that were considered 'Italian'.

It should be acknowledged that «the Italian immigrant, and later Italian colonist in Brazil was […] pragmatic. They experienced adversities, as historically proven, but equally knew how to make use of the existing opportunities, transforming their family into a production unit from which they extracted surplus and generated profits»[66]. Others who emigrated with capital, or a profession, achieved good living conditions and some even became rich. But many, whose pages history sometimes ignores, died during the crossing, or as soon as they arrived some went mad, others found an escape from the pains of their experience in *cachaça* (sugar cane alcohol) and in other vices. And many, simply managed to survive. The possession of land, denied freed blacks, was an opportunity in Brazil. But not all met with success. Not all got to go to school. And many neither recognized themselves as Italians nor as Brazilians.

One foot there and another here. The identity process is constituted through relations with other groups, demarcating differences that are produced, especially, by symbolic markings[67]. Social and material conditions are important in constructing an identity that is constantly negotiated. Thus «the speeches and systems of representation construct the places based on which individuals can take a position and from which they can speak»[68]. Experiences are lived and signified based on a mode of identification that is grasped in a given cultural context. If we think about identity as a 'becoming'[69] we can obtain at least some of the meanings of the ensemble of celebrations that involved what was spelled out previously. Among parades, masses, speeches, fireworks, singing anthems and music, intense celebrations permeated by many symbols that inaugurated and exalted the history of immigration, at that time celebrated in its 50th Anniversary – with the monuments, album, exhibitions. An 'epic' of heroes who defeated – through work and faith – the problems that presented

66 M.C.C. Zanini, *Italianidade no Brasil Meridional. A construção da identidade étnica na região de Santa Maria*, RS, Santa Maria, RS, editora UFSM, 2006, p. 144.

67 «The symbolic marking is the means through which we make sense of the practices and social relations, defining, for instance, who is excluded and who is included». K. Woodward, *Identidade e diferença. Uma introdução teórica e conceitual*, in T.T. da Silva (ed.), *Identidade e diferença. A perspectiva dos Estudos Culturais*, Petrópolis, RJ, Vozes, 2000, p. 14.

68 Woodward, *Identidade e diferença. Uma introdução teórica e conceitual*, cit., p. 17.

69 See S. Hall, *Identidade cultural na pós-modernidade*, 11ed., Rio de Janeiro, DP&A Editora, 2011.

themselves and achieved progress and the desired success. Mixtures of narrated stories, a cross-breeding of intentions in the discourses and acts of celebration, but ultimately, the desire to be acknowledge by the other, by the different, by the Brazilian – in their Italiannes. But this was not a uniform or simple process.

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L'apartheid educativo nell'Eritrea italiana. Quali scuole per i meticci?

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The educational apartheid in Italian Eritrea. What schools for halfcastes?

ABSTRACT: Educational system was double in Eritrea throughout the colonial period: schools for nationals and schools for natives. The presence of Italian Eritreans cracked the separatist backbone of colonial body. In fact, *halfcastes* created ambiguity because they were neither all Italian nor all African. What schools could Italian Eritreans attend? Those for nationals? Those for natives? Until 1939, the few halfcastes acknowledeged by the Italian father had the right to go to schools for nationals. Moreover, catholic missionaries arranged boarding schools specifically designed to provide Italian Eritreans with an Italian education. Those residential educational extablishments were also open to the many unacknowledged halfcastes. During the second half of the 1930s, the political strategy towards Italian Eritreans degenerated into segregation. That change occurred under pressure from fascist biological racism: halfcastes were an expression of biological decline because they were impure of blood. They therefore could not be deemed as Italian: they were African. Consequently, the law no. 822 of 1940 denied Italian Eritreans access to schools for nationals and banned missionary catholic institutions for halfcastes. Mixed *race* people were allowed to attend only schools for natives.

EET/TEE KEYWORDS: Colonialism; Political power; Educational deficit; Racial segregation; East Africa; XXth Century.

Introduzione

> The colonial power [had the purpose to rule as cheaply as possible through] establishing a distinct separation between the Italian colonialist and the African colonized subject. A distinction had not only to be drawn between the colonizer and the colonized, but the position of the half-caste had also to be

> regulated. Uncontrolled [interracial] sexual contacts […] would result in the growth of a half-caste population with serious political consequences[1].

La parabola coloniale italiana in Eritrea ha due estremi cronologici, il 1890 e il 1941: il primo gennaio del 1890, con il Regio Decreto n. 6592[2], i possedimenti italiani sul Mar Rosso furono aggregati in quella che fu denominata colonia Eritrea; dall'8 aprile del 1941, a seguito della decisione di Mussolini di sostenere Hitler nella seconda guerra mondiale, il territorio eritreo finì sotto occupazione britannica. Cinquantuno anni di dominio coloniale italiano, dunque, giunsero al termine.

Il quadro di insieme che emerge in relazione all'offerta di servizi educativi nell'Eritrea sotto occupazione italiana ha quale elemento strutturale quello della bipartizione del sistema di formazione: un canale educativo per i cittadini italiani, un altro per i sudditi coloniali. La segregazione educativa dei nativi comportò, oltre all'interdizione dalle scuole a fruizione nazionale, anche la povertà delle opportunità di istruzione a disposizione della gioventù eritrea.

A fronte della segmentazione su base razziale del sistema di formazione in Eritrea, i nati da padre italiano e da madre indigena, in ragione della doppiezza di appartenenza, costituivano un'anomalia da gestire. A che tipo di istruzione i meticci[3] potevano avere accesso? A quella dettata dalle linee curricolari nazionali? Oppure erano da relegare alle scuole a fruizione indigena? Oppure necessitava la formulazione di altre soluzioni educative che si attagliassero alla specificità di questi giovani di *razza*[4] mista?

Passando in rassegna la letteratura sui dispositivi educativi creati in Eritrea durante il periodo coloniale[5], i due soli studi di più ampio respiro sono stranieri: lo storico eritreo Tekeste Negash, con *Italian Colonialism in Eritrea, 1882-*

[1] T. Negash, *Italian Colonialism in Eritrea, 1882-1941. Policies, Praxis and Impact*, Uppsala, Uppsala University Press, 1987, pp. 109-110.

[2] Regio Decreto 1° gennaio 1890, n. 6592 – *Regio decreto 6592 (3ª Serie), che organizza un'amministrazione civile nella colonia Eritrea*, in G.U. 7 gennaio 1890, n. 4.

[3] Il termine meticcio è percepito come offensivo dagli italo-eritrei per l'alta carica di rimandi semantici negativi. Nondimeno questo appellativo è storicamente ineludibile perché, nella società coloniale, era quello con cui era designato il figlio di padre italiano e di madre indigena.

[4] Data la non scientificità delle dottrine razziste, utilizzo il termine razza in senso storico-ideologico.

[5] Le implicazioni educative della presenza coloniale italiana in Eritrea costituiscono, da più angolazioni visuali, un'area della conoscenza storica la cui fecondità euristica rimane solo in parte espressa.

1941. Policies, Praxis and Impact, ha illuminato il nesso fra istruzione e potere all'interno di una più ampia ricostruzione della colonializzazione italiana dell'Eritrea[6]; la storica norvegese Christine Smith-Simonsen, con «*…all'Ombra della Nostra Bandiera». A Study on Italian Educational Activities in Colonial Eritrea, 1890-1941*, ha offerto lo studio più corposo sull'amministrazione scolastica nell'Eritrea italiana[7]. All'istruzione in Eritrea, dal periodo precoloniale fino agli anni Ottanta del secolo scorso, ha inoltre dedicato un saggio Adane Taye[8]. Merita una menzione anche Berhane Teklehaimanot per avere indagato la politica educativa in Eritrea nel periodo che si estende dall'occupazione italiana all'amministrazione militare britannica[9]. Interessanti altresì le brevi incursioni storiografiche di Jonathan Miran[10] e Asgedet Stefanos[11], rispettivamente sull'attività educativa missionaria in colonia e sull'istruzione delle indigene. In Italia, a fronte di questi input di ricerca generatisi all'estero, mancano progetti storiografici di vasta portata sul tema dell'istruzione nella colonia Eritrea. Dalla metà degli anni Ottanta, un nucleo di studiosi – da Massimo

[6] Negash, *Italian Colonialism in Eritrea*, già citato. Tekeste Negash ha prodotto uno studio elegantemente argomentato della storia coloniale eritrea. Il contributo di questo storico alla comprensione della valenza politica del lavoro educativo nel contesto del dominio coloniale italiano è il più ragguardevole nel panorama storiografico. Alla politica educativa nell'Eritrea italiana, Negash dedica il capitolo *The ideology of Colonialism: Educational Policy and Praxis*, in parte riproposto in Id., *The Ideology of Colonialism: Educational Policy and Praxis in Eritrea*, in R. Ben-Ghiat, M. Fuller (edd.), *Italian Colonialism*, New York, Palgrave Macmillan, 2008, pp. 109-119.

[7] C. Smith-Simonsen, *«…all'Ombra della Nostra Bandiera». A Study on Italian Educational Activities in Colonial Eritrea, 1890-1941*, unpublished M.A. thesis, University of Tromsø, 1997. Sono grato a Christine Smith-Simonsen per avermi messo a disposizione la sua tesi dottorale, altrimenti irreperibile. Questo studio è disponibile in forma di compendio: Ead., *The Beginnings of Western Education in Eritrea*, «Eritrean Studies Review», vol. 5, n. 1, 2007, pp. 259-309.

[8] A. Taye, *A Historical Survey of State Education in Eritrea*, Asmara, EMPDA, 1991. Adane Taye rende intellegibili i legami tra realizzazioni educative e opportunità politiche; dei fenomeni che afferiscono all'ambito dell'istruzione, lo studioso coglie la *ratio* in relazione ai regimi politici via via susseguentisi: etiope precoloniale, coloniale italiano, coloniale britannico, federale eritreo-etiope, etiope monarchico, etiope rivoluzionario.

[9] B. Teklehaimanot, *Education in Eritrea during the European Colonial Period*, «Eritrean Studies Review», vol. 1, n. 1, 1996, pp. 1-22.

[10] J. Miran, *Missionaries, Education & the State in the Italian Colony of Eritrea*, in H.B. Hansen, M. Twaddle (edd.), *Christian Missionaries & the State in the Third World*, Athens (OH), Ohio University Press, 2002.

[11] A. Stefanos, *Women and Education in Eritrea: a Historical and Contemporary Analysis*, «Harvard Educational Review», vol. 67, n. 4, December 1997, pp. 658-689.

Romandini[12] a Gabriella Ciampi[13], da Irma Taddia[14] a Giulia Barrera[15], da Laura Ricci[16] a Alessandro Volterra[17] fino a Silvana Palma[18] – ha posto sotto la lente della ricerca fonti settoriali o periodi circoscritti o aspetti parcellari della fenomenologia educativa nella colonia Eritrea, senza leggere quanto è accaduto in maniera dialetticamente unitaria[19].

[12] M. Romandini, *Il problema scolastico nella Colonia Eritrea: gli anni 1898-1907*, «Africa», Istituto Italiano per l'Africa e l'Oriente, vol. 39, n. 3, settembre 1984, pp. 494-502. Massimo Romandini si è occupato dell'amministrazione scolastica in Eritrea durante il decennale governatorato di Ferdinando Martini.

[13] G. Ciampi, *La scuola nelle colonie*, in C. Ghezzi (ed.), *Fonti e problemi della politica coloniale italiana*, Atti del Convegno internazionale, Taormina-Messina, 23-29 ottobre 1989, 2 voll., Roma, Istituto Poligrafico e Zecca dello Stato - Archivi di Stato, 1996. L'attenzione storiografica di Gabriella Ciampi si è brevemente focalizzata sull'atteggiamento assunto dalle forze governative italiane riguardo al problema dell'istruzione nella colonia Eritrea dal primo insediamento sulle coste del Mar Rosso fino al governatorato di Giuseppe Salvago Raggi.

[14] I. Taddia, *Autobiografie africane. Il colonialismo nelle memorie orali*, Milano, FrancoAngeli, 1996. Uno degli interessi di ricerca di Irma Taddia ha riguardato la memoria orale africana del colonialismo italiano. Tutti gli intervistati eritrei, nel trasmettere il ricordo del fenomeno coloniale, hanno denunciato la negligenza delle forze governative italiane rispetto alla crescita educativa della popolazione indigena.

[15] G. Barrera, *Patrilinearità, razza e identità: l'educazione degli italo-eritrei durante il colonialismo italiano (1885-1934)*, «Quaderni storici», vol. XXXVII, n. 109, fasc. 1, 2002, pp. 21-54. Giulia Barrera, come avremo modo di appurare, è l'unica storica ad aver guardato, dall'angolo visuale dell'educazione, alla questione dei meticci.

[16] L. Ricci, *La lingua dell'impero. Comunicazione, letteratura e propaganda nell'età del colonialismo italiano*, Roma, Carocci, 2005; Ead., *Politiche culturali e didattica dell'italiano nelle colonie africane*, in S. Gentili, S. Foà (edd.), *Cultura della razza e cultura letteraria nell'Italia del Novecento*, Roma, Carocci, 2010. Laura Ricci è una linguista e non una storica. Tuttavia, la studiosa ha mostrato sensibilità storiografica nell'applicazione delle competenze linguistiche allo studio della diffusione della lingua italiana nel contesto coloniale e all'analisi formale e contenutistica della manualistica scolastica per la gioventù indigena.

[17] A. Volterra, *Le politiche educative fasciste per gli indigeni in Eritrea (1931-1941)*, «Mondo contemporaneo», n. 1, 2007, pp. 5-42; Id., *Sudditi coloniali. Ascari eritrei 1935-1941*, Milano, FrancoAngeli, 2010. Alessandro Volterra, oltre al vaglio della politica educativa nell'Eritrea italiana durante il periodo fascista, si è soffermato sulle opportunità di istruzione offerte ai componenti delle truppe coloniali e sulla preparazione militare nelle scuole per i nativi a cura dell'organizzazione chiamata Pre-ascari.

[18] S. Palma, *Educare alla subalternità. Prassi e politiche scolastiche nella colonia Eritrea*, in B.M. Carcangiu, T. Negash (edd.), *L'Africa orientale italiana nel dibattito storico contemporaneo*, Roma, Carocci, 2007; Ead., *L'oro e la scrittura, La formazione della gioventù eritrea nelle scuole elementari dei primi anni Trenta*, in U.C. Dirar, S. Palma, A. Triulzi, A. Volterra (edd.), *Colonia e postcolonia come spazi diasporici*, Roma, Carocci, 2011; Ead., *L'istruzione in colonia. La scuola governativa per indigeni di Asmara*, in A. Bausi, A. Brita, A. Manzo (edd.), *Aethiopica et Orientalia. Studi in onore di Yaqob Beyene*, 2 voll., Napoli, Università «l'Orientale», 2012. Il contributo di Silvana Palma è importante perché la storica, oltre che una trattazione panoramica, ancorché non esaustiva, delle tappe della politica educativa nella colonia Eritrea, compie anche un esame dei libri di testo per gli indigeni e un'esplorazione pioneristica dei giornali di classe in uso nella scuola Roma di Adi Caieh e nella scuola Vittorio Emanuele III di Asmara.

[19] Nella tesi elaborata per il conseguimento della laurea magistrale, ho cercato di tenere assieme, in una compagine coerente e allo stesso tempo complessa, tutte le produzioni storiografiche sui fenomeni educativi nell'Eritrea italiana, sulla base di un'impostazione di analisi che, sull'esempio di

All'interno del panorama storiografico, solo Giulia Barrera si è occupata degli orientamenti delle forze governative italiane in merito all'istruzione degli italo-eritrei; il periodo in esame va dal 1885 fino al 1934, cioè dalla presa di Massaua[20] fino a prima della promulgazione delle leggi razziali coloniali. Inoltre, come vedremo, la studiosa ha compiuto una disamina delle variazioni nella posizione politico-giuridica del meticciato nel corso del tempo, a partire dalla controversa tendenza all'assimilazione per discendenza paterna dalla cultura italiana fino alla presa di posizione segregazionista normata dallo Stato fascista sulla base del razzismo biologico[21].

Il presente saggio, la cui genesi è ascrivibile all'interesse di ricerca suscitato dalla lettura del contributo di Barrera, tenta di ricostruire nelle linee essenziali la vicenda educativa dei meticci nella colonia Eritrea fino a quando, nel 1940, il pacchetto normativo razziale coloniale fu portato a compiutezza di implementazione. Rispetto alla destinazione degli italo-eritrei all'interno della piattaforma a doppio canale del sistema di istruzione in colonia, a segnare il discrimine intervennero gli assunti razzisti di cui il fascismo si andò corredando, non senza l'apposizione di un *imprimatur* pseudoscientifico, nel corso degli anni Trenta. In questo lavoro ricostruttivo che mi accingo a proporre, l'attenzione analitica è elettivamente rivolta al chiarimento delle ragioni politiche a fondamento della necessità di posizionamento dei meticci al di là dello sbarramento razziale, prima dalla parte italiana e poi da quella africana.

1. *Bipartizione dell'organizzazione scolastica su base razziale. La sorte dei meticci*

Lo svolgimento del tema dell'educazione dei meticci[22] richiede in via preliminare una breve ricognizione dell'organizzazione scolastica nell'Eritrea

Tekeste Tekash, è diretta a scandagliare le logiche politiche soggiacenti alle formule educative. Mi permetto di rinviare a questo testo: V. Minuto, *Educazione e autorità nella Colonia primogenita. La politica educativa nell'Eritrea italiana, 1890-1941*, tesi di laurea non pubblicata, Università degli Studi di Padova, Corso di Laurea magistrale in Scienze pedagogiche, a.a. 2017-2018.

20 La presa di Massaua, avvenuta nel 1885, fu la prima delle azioni militari che condussero alla conquista del territorio a cui fu dato il nome di Eritrea.

21 Cfr. Barrera, *Patrilinearità, razza e identità*, cit., pp. 21-54.

22 Per quanto riguarda la popolazione italiana nella colonia Eritrea, la *sex ratio* era sproporzionata: il numero dei maschi era nettamente superiore a quello delle femmine. Non sorprende, quindi, che molti degli italiani tenessero presso di sé indigene con cui avevano rapporti sessuali, oltre a riceverne servizi domestici. Nella convivenza *more uxorio* con queste donne, pratica nota come madamato, alla facilità con cui la controparte maschile accedeva a prestazioni sessuali e domestiche si aggiungeva il vantaggio di non essere tenuta a corrispondere ai doveri associati alle unioni matrimoniali. Da queste relazioni di concubinaggio nacque una progenie la cui entità è difficilmente quantificabile. Senz'altro, nel 1931, il totale degli iscritti nei registri di stato civile italiani ammontava a 4.188; dal fatto che 515 meticci fossero registrati in queste liste, possiamo

italiana. A un bilancio dei conseguimenti della politica dell'istruzione nell'Oltremare eritreo, colpisce l'evidenza dell'insufficienza dell'impegno governativo coloniale allo sviluppo educativo dei nativi:

> During the Italian colonial period, Eritrea had been educationally a desert. There were few poor schools. Trained teachers were non-existent nor were there suitable textbooks available. Education in Eritrea remained at elementary level. Within a span of fifty years, there were only few elementary schools[23].

L'esigua portata di iniziative educative in colonia, sebbene fosse in parte causata dalla carenza di risorse finanziarie a disposizione delle forze governative italiane, rifletté la determinazione politica a mantenere basso il livello di istruzione della gioventù eritrea. Le deficienze educative alienavano il sentimento di parità con i cittadini italiani e imprimevano nella coscienza dei sudditi coloniali un marchio di inferiorità; questa rappresentazione, una volta interiorizzata dalle nuove generazioni indigene, concorreva in maniera determinante alla perpetuazione dell'ordine coloniale.

La non esposizione dei nativi a sollecitazioni intellettualmente *troppo* feconde esigeva la negazione della fruizione delle opportunità educative offerte alla gioventù italiana. Lungo tutto il periodo coloniale, infatti, l'articolazione del sistema di formazione in Eritrea fu bipartita: scuole per i cittadini italiani, scuole per i sudditi coloniali. L'apartheid educativo, sebbene suffragato in maniera definitiva dal razzismo di Stato fascista, costituì la norma per tutta la durata dell'occupazione italiana. Oltre all'esclusione dell'elemento indigeno dalle scuole a fruizione nazionale, dette di tipo metropolitano, che riprendevano i programmi in uso in Italia, il separatismo educativo implicò anche la differenziazione del curricolo in termini di immiserimento delle proposte didattiche che erano indirizzate ai giovani eritrei: «Dual system of education, always of lower quality for Eritreans, was to persist not only in government schools, but to a larger extent in the missionary schools as well»[24].

A fronte della dichiarazione del principio della separazione razziale nella politica educativa nei confronti dei nativi, Silvana Palma riferisce dell'esistenza, nel concreto della prassi scolastica, di eccezioni a questa regola. La storica prende in esame il caso della scuola elementare Roma nella cittadina di Adi Caieh. Ufficialmente, la scuola era annoverata tra quelle a fruizione nazionale; tuttavia, dai dati statistici riportati sull'*Annuario delle scuole coloniali dell'Africa*

desumere che circa un italiano su otto era nato da madre indigena. Cfr. Barrera, *Patrilinearità, razza e identità*, cit., pp. 23-24.

23 Taye, *A Historical Survey of State Education in Eritrea*, cit., p. 32.

24 G.T. Wagaw, *Education in Ethiopia. Prospect and retrospect*, Ann Arbor, University of Michigan Press, 1979, p. 43. I servizi educativi a gestione missionaria preesistevano alla fondazione della colonia Eritrea, mentre l'avvio del sistema di istruzione governativo avvenne alla svolta del Novecento: l'apertura delle prime scuole di tipo metropolitano risale ai primi anni del secolo; quella delle prime scuole a fruizione indigena si colloca nei primi anni Dieci.

Orientale emerge che, al 1° gennaio del 1935, gli iscritti erano 5 italiani, 11 meticci, 6 greci e 133 eritrei[25]. La proibizione della coesistenza razziale in classe fu con tutta probabilità superata sulla scorta di una constatazione di fatto: il numero ridotto degli alunni di provenienza europea non rendeva possibile l'apertura di una scuola razzialmente riservata. Sull'imperativo dell'apartheid educativo, quindi, prevalse la soluzione pragmatica della formazione di una scuola mista[26].

Nondimeno le deroghe al canone separatista non erano illimitate, come precisa Palma:

> Nella sua realtà di scuola mista, quella di Adi Caieh, almeno formalmente, appare indifferente ai criteri di razza […] che puntellano la gerarchizzazione sociale su cui si fonda la società coloniale, soprattutto fascista. La stessa indifferenza non guida, però, i programmi seguiti dalla scuola. Sotto questo aspetto l'amministrazione coloniale mostra di non perdere mai di vista le finalità dell'istruzione degli indigeni, tanto da eludere il curriculum proprio delle scuole di 'tipo metropolitano', quale la scuola di Adi Caieh effettivamente è, sostituendolo, nella prassi, con quello previsto per le scuole per indigeni, senza preoccuparsi di penalizzare vistosamente, così facendo, la preparazione (e 'i diritti') dell'esigua minoranza bianca e italiana che la frequenta[27].

A sostegno della separazione dei canali educativi intervennero giustificazioni ideologiche; la formazione dei sudditi coloniali non poteva essere intellettualmente esigente per i motivi seguenti: 1) perché risultava pretenziosa a fronte dei bisogni strettamente pratici della tradizione agricola e pastorale dell'Eritrea[28]; 2) perché non era adatta all'inclinazione alla manualità insita

[25] Ministero delle Colonie, *Annuario delle scuole coloniali dell'Africa Orientale*, Roma, Angelo Signorelli, 1935, p. 33. Il documento è consultabile online all'indirizzo: <https://books.google.it/books?id=jMJApqA3vtgC&printsec=frontcover&dq=%22annuario+delle+scuole+coloniali+dell%27africa+orientale%22+1935&hl=it&sa=X&ved=0ahUKEwjVxI3R4O3oAhUH0qYKHW6IBLgQ6AEIKDAA#v=onepage&q=%22annuario%20delle%20scuole%20coloniali%20dell'africa%20orientale%22%201935&f=true> (ultimo accesso: 16.04.2020).

[26] Cfr. Palma, *L'oro e la scrittura*, cit., pp. 117-122 e 142.

[27] *Ibid.*, p. 142.

[28] Mattia Mininni Caracciolo, giurista che era assurto al ruolo di esperto di istruzione coloniale, sosteneva, senza riguardo per la priorità della formazione intellettuale, che i servizi educativi destinati ai nativi fossero da accomodare alle peculiarità socio-economiche del *milieu* locale. Cfr. Id., *La scuola nelle colonie italiane di dominio diretto*, «Rivista pedagogica», vol. XXIII, n. III, 1930, pp. 183-207.

nella mentalità indigena[29]; 3) perché era al di là della facoltà di intendimento a disposizione della razza nera[30].

La funzione dell'impianto separatista dell'organizzazione scolastica nell'Eritrea italiana era stata enunciata senza infingimenti ideologici dal governatore Ferdinando Martini[31] quando prefigurò, qualora le scuole fossero state miste, come tutt'altro che remota la possibilità di «più solleciti […] profitti» e di «maggiore […] diligenza» da parte dei giovani eritrei; ad avviso dell'alto funzionario coloniale, «tutto ciò» sarebbe andato a «inscapito singolare di quel sentimento della superiorità dell'uomo bianco che occorre in ogni guisa infondere nell'uomo di colore»[32]; inorgogliti dal successo scolastico, gli alunni eritrei (i colonizzati) avrebbero creduto di essere in grado di uguagliare quelli italiani (i colonizzatori); e questo era assolutamente da evitare. Nelle scuole miste, dunque, l'aura di prestigio dell'uomo bianco rischiava di mostrarsi infondata; affinché fosse preservata, erano da bandire «raffronti» tra gli alunni italiani e quelli eritrei, la cui «intelligenza» risultava spesso essere «troppo più agile e pronta»[33].

Più in generale, al di là dell'apartheid educativo, a cosa serviva la separazione tra colonizzatori e colonizzati? La risposta a questo interrogativo è rintracciabile nell'istanza di ridurre alla minorità psicologica un popolo già sottomesso con le armi. Il regime coloniale poteva protrarsi nel tempo solo in grazia della riuscita di un artificio psicologico: quello di propinare all'elemento indigeno la credenza che la colonizzazione sussistesse a buon diritto perché perpetrata da un popolo superiore. La supremazia bianca in Africa avrebbe resistito fintantoché i neri fossero stati intimamente persuasi di essere inferiori; le

[29] Dalla *Prefazione* al volume *Industrie, arti, mestieri. Manuale ad uso degli indigeni nelle due lingue italiano-tigrignà* del 1914 apprendiamo che il governo coloniale era attento a dare «ai ragazzi indigeni la possibilità di perfezionarsi in quell'arte manuale, che è più confacevole al loro gusto e alle loro innate qualità». La preoccupazione di adeguare il materiale didattico alla presunta inclinazione naturale dell'elemento indigeno alle attività manuali non aveva nulla di pedagogico; aveva a che far con la necessità, da parte italiana, di lesinare gli insegnamenti teorici per concentrarsi sulla formazione professionale sufficiente a disporre di manodopera eritrea non troppo qualificata. Missione cattolica (ed.), *Industrie, arti, mestieri. Manuale ad uso degli indigeni nelle due lingue italiano-tigrignà*, 2 voll., Asmara, Tipografia Francescana, 1914, dalla *Prefazione*.

[30] Nel corso degli anni Trenta, il dominio coloniale italiano, sulla scorta dell'ideologia razzista del fascismo, attinse, a titolo di autolegittimazione, alle elucubrazioni pseudoscientifiche sull'incolmabile insufficienza intellettiva delle popolazioni africane. Così scriveva l'antropologo Lidio Cipriani: «Sulle razze africane pesa un imperativo biologico da cui son rese sempre meno atte non solo ad assimilare una civiltà straniera un po' elevata, ma perfino a serbare la propria. […] È infondato, perciò, pretendere l'ascesa evolutiva di genti trascinate […] alla decadenza da invincibili cause congenite». Id., *Razzismo e Possessi Coloniali*, «La Difesa della Razza», vol. I, n. III, 5 settembre 1938, p. 16.

[31] Ferdinando Martini ricoprì la carica di governatore della colonia Eritrea per una decade, dal 1897 al 1907.

[32] F. Martini al Ministero degli Affari Esteri, rapporto dell'11 febbraio 1898, in ASMAE, ASMAI, *Scuole in Africa*, b. 4, fasc. 1/4 (cito da Ciampi, *La scuola nelle colonie*, cit., p. 680).

[33] F. Martini, *Il diario eritreo*, Firenze, Vallecchi Editore, 1943, Vol. 2, p. 472.

istituzioni coloniali sarebbero state al sicuro fintantoché le popolazioni africane avessero avuto la profonda convinzione di meritare lo status subordinato a cui erano relegate. Dunque, la soggezione dei nativi esigeva il mantenimento del mito dell'inarrivabilità dei bianchi. Il sentimento di superiorità dell'uomo bianco, e complementarmente quello di inferiorità del *negro*, era inculcato nelle popolazioni africane attraverso la prassi segregazionista in tutti gli ambiti della vita sociale coloniale, incluso quello educativo. Come scrive Adane Taye,

> through well planned policy and instruction, natives were reminded of race purity and white supremacy. The members of the white race had the best education, the best homes, the best jobs, and public services. As a result their beliefs of superiority were strenghethened, while the natives were reminded from time to time and everywhere of their inferiority. In fact, the natives had no social benefit, such as those enjoyed by the white people. The colour bar was enforced. They were segregated from school, areas of residence, dining and sleeping houses, employment and other public facilities. Even in regard to items such as clothing and footwear the natives were limited to only locally made clothes, products, etc[34].

Attraverso la segregazione razziale, di cui il separatismo educativo era una delle espressioni, i neri introiettavano un'immagine di sé come di essere carenti. La prassi segregazionista, dunque, con i suoi effetti inferiorizzanti, era funzionale alla costruzione della disparità di status fra colonizzatori e colonizzati.

In relazione a questo disegno di divisione sociale, i meticci, in quanto in parte italiani e in parte africani, erano fonte di ambiguità[35]. Nel 1908, il giornalista Renato Paoli scriveva:

> Stiamo moltiplicando *madame*[36] e *cioccolatini*[37]. Ma appunto qui sta il *busillis*. Quale sarà la sorte dei meticci? I figli d'un italiano e d'una nera, legittimati da quello, a parte i diritti conferiti dalla legge, come saranno considerati?[38]

L'ambivalenza dei «figli d'un italiano e d'una nera» metteva in crisi la struttura separatista del sistema coloniale. Come erano da reputare i meticci? Come italiani? Come africani? Quali scuole dovevano frequentare? Quelle a fruizione nazionale? Quelle a fruizione indigena?

[34] Taye, *A Historical Survey of State Education in Eritrea*, cit., p. 33.

[35] Richiamando le definizioni fornite da uno degli aderenti al *Manifesto degli scienziati razzisti*, Nicola Marchitto, ricordo che, al di là del fatto che l'esistenza di questo «ibrido» o peggio di questo «bastardo» rendeva problematica l'applicazione degli standard di categorizzazione razziale, il meticcio era oggetto di spregio sociale in quanto la nascita da un'unione non matrimoniale ne faceva il «frutto di una colpa». Id., *La difesa della razza nell'Impero: il problema dei meticci*, Napoli, G.U.F. «Mussolini», 1939, pp. 21, 28 e 22.

[36] Il termine madama per la designazione dell'indigena convivente con un italiano era spregiativo in quanto in Italia era adoperato per indicare la tenutaria di un bordello.

[37] Il riferimento agli italo-eritrei come a cioccolatini testimonia del tenore avvilente della considerazione a cui andavano soggetti.

[38] R. Paoli, *Nella Colonia Eritrea: studi e viaggi*, Milano, Fratelli Treves, 1908, p. 299 [corsivo nel testo].

Fino al 1935, ossia durante la gran parte della colonizzazione italiana dell'Eritrea, la politica coloniale nei confronti degli italo-eritrei si qualificò come assimilazionista sulla base del criterio patrilineare di identificazione culturale; in altre parole, prevalse, non senza polemiche, la nozione che l'identità culturale dei meticci discendesse dalla parte paterna: i figli di padre italiano, ancorché la madre fosse indigena, erano da ritenere italiani.

Pochi italiani, soprattutto quelli che si erano stabiliti permanentemente in colonia, riconobbero e allevarono i figli avuti da indigene[39].

I pochi meticci riconosciuti avevano diritto alla cittadinanza italiana, insieme con tutti i privilegi che essa implicava, incluso quello di frequentare le scuole a fruizione nazionale[40]. Inoltre, i missionari cattolici gestivano appositamente per i meticci istituti che alla garanzia di un'educazione italiana coniugavano i benefici della soluzione convittuale.

Tuttavia, gran parte degli italiani, specie quelli la cui permanenza in colonia era a tempo determinato, disconobbe la prole avuta da indigene.

Quale fu il destino degli italo-eritrei non riconosciuti? Anche i meticci privi di riconoscimento andarono incontro a un processo di italianizzazione; infatti, dal 1917, potevano essere iscritti, dopo le dovute indagini, nei registri di stato civile italiani come figli di padre italiano ignoto[41]; poi, la legge n. 999 del 1933[42], all'art. 18, accordò ai meticci non riconosciuti la possibilità di ottenere la cittadinanza italiana in base ai requisiti seguenti: 1) il superamento di un esame medico di accertamento dei «caratteri somatici e altri indizi [che] facciano fondatamente ritenere che uno dei genitori sia di razza bianca» (questo esame era definito prova della razza) e 2) il possesso di una «educazione perfettamente italiana»[43].

L'assimilazione dei meticci alla cultura italiana veniva promossa dalle stesse indigene, in larga maggioranza tigrine[44]. Per queste madri, in conformità con la norma sociale tigrina, l'identità culturale della prole era patrilineare; il fatto che la cultura dei figli seguisse «la linea di discendenza paterna ha giocato un ruolo fondamentale nella costruzione dell'identità degli italo-eritrei»[45]: quindi, le indigene, anche in caso di abbandono paterno, incoraggiavano la prole a

[39] Tra questi, il più noto è Alberto Pollera, etnografo e funzionario coloniale in Eritrea. Padre di sei figli nati da due indigene, si rese protagonista di una personale battaglia contro le leggi razziali coloniali che vietavano *i rapporti d'indole coniugale tra cittadini e sudditi* e il riconoscimento, da parte del genitore italiano, della prole meticcia.

[40] Cfr. Teklehaimanot, *Education in Eritrea during the European Colonial Period*, cit., p. 6.

[41] Cfr. Barrera, *Patrilinearità, razza e identità*, cit., pp. 39-40.

[42] Legge 6 luglio 1933-XI, n. 999 – *Ordinamento organico per l'Eritrea e la Somalia*, in G.U. 16 agosto 1933, n. 189.

[43] *Ibid*., p. 3676. Cfr. altresì Barrera, *Patrilinearità, razza e identità*, cit., pp. 42-23; M. Strazza, *Faccetta nera dell'Abissinia. Madame e meticci dopo la conquista dell'Etiopia*, «Humanities», vol. 1, n. 2, giugno 2012, pp. 118-119.

[44] Quello tigrino è il gruppo etnico numericamente maggioritario in Eritrea.

[45] Barrera, *Patrilinearità, razza e identità*, cit., p. 46.

identificarsi con la cultura italiana. Di conseguenza, «l'italianizzazione degli italo-eritrei fu una realizzazione ancor più eritrea che italiana»[46].

Le indigene affidavano i figli non riconosciuti dal padre italiano alle scuole a convitto a conduzione missionaria cattolica. Gli italo-eritrei, entrati bambini, «venivano tenuti fino a 17 anni, sottoposti a severa disciplina e in completo isolamento rispetto alla società circostante»[47]. I missionari ne assumevano la custodia, mentre

> le madri ne perdevano il controllo. Le madri, infatti, non potevano ritirare i figli prima che questi avessero raggiunto il diciassettesimo anno di età; ai bambini inoltre non era mai consentito andare a casa, nemmeno per le feste. […] Veniva proibito di parlare la lingua materna, tanto che i bambini entrati molto piccoli in istituto ne uscivano sapendo parlare solo l'italiano. L'educazione impartita era prettamente italiana[48].

Le madri di meticci non riconosciuti erano spesso indigenti. Per questa ragione, lo stesso governo coloniale si fece carico della sistemazione di questi giovani negli istituti per meticci gestiti dai missionari cattolici.

Questa iniziativa governativa non era volta alla tutela degli italo-eritrei. La politica di italianizzazione dei meticci serviva, in realtà, a sgombrare il campo coloniale da ogni forma di ambiguità. Il meticciato, in quanto frutto di combinazione razziale, era un elemento confusivo che disturbava il separatismo nella vita sociale coloniale. A perpetuazione dell'esistenza di due comunità a sé stanti, fino al 1935, gli italo-eritrei, non senza contestazioni, furono assimilati. Così poteva restare netta la distinzione tra colonizzatori e colonizzati.

Il 1936 fu l'anno della svolta: la strategia politica nei confronti degli italo-eritrei, da assimilazionista, divenne segregazionista; fu adottata una politica di africanizzazione e non più di italianizzazione dei meticci. Gli italo-eritrei, sempre con l'intento di rimuoverne il carattere di doppiezza, furono forzatamente collocati sul versante africano della categorizzazione razziale in modo che le linee dell'apartheid potessero essere indubitabili.

A che cosa fu dovuto questo cambiamento? La cospicua affluenza italiana nel Corno d'Africa in relazione alla mobilitazione militare per la campagna d'Etiopia tra il '35 e il '36 fece temere il dilagare incontrollato del meticciato e, con ciò, l'insidioso accorciamento della distanza di status tra dominatori e dominati. Così, a partire dal 1936, all'indomani della conquista dell'Abissinia, fu intrapresa una campagna ideologica contro il «fardello dei bastardi in colonia»[49]. Questa operazione sfociò nel varo di quelle leggi razziali coloniali con cui fu data forma giuridica alla prassi segregazionista già invalsa da tempo[50]; in seguito alla istituzionalizzazione del razzismo,

[46] *Ibid*.
[47] *Ibid*., p. 41.
[48] *Ibid*., pp. 36 e 41.
[49] L. Cipriani, *Razzismo*, «La Difesa della Razza», vol. I, n. I, 5 agosto 1938, p. 12.
[50] «This sort of institutionalised racism was a peculiarity of Italian Fascism: under pre-Fascist

the living conditions for the local population were continuosly deteriorating in every way. Still, there was one group, namely the halfcastes, which probably suffered the greatest loss, due to a harshening of racial prejudice within Fascist policies. Up till now, they had enjoyed certain privileges, thus the depriving of these not only lowered their status, but left them in a kind of social void; 'not quite/not white'[51].

L'argomento ideologico più esibito a supporto della lotta al meticciato fu quello della difesa della razza, quella bianca, di cui la *gens* italica era insigne componente. Questa tesi prese le mosse dagli assunti pseudoscientifici che informavano il razzismo biologico di matrice fascista. Al riguardo, Lidio Cipriani, antropologo che siglò il *Manifesto degli scienziati razzisti*, scriveva:

> Era tempo […] che anche da noi si prendessero a scrutare con superiori propositi le qualità insite per motivi biologici nella nostra gente e si promovesse un movimento per convincere la generalità dei cittadini degli eccelsi motivi per cui è doveroso tramandare codeste qualità inalterate o se è possibile migliorate. […] Ripeto, è tempo […] di vedere quanto nelle nostre opere e nel nostro successo nel mondo è favorito da un particolare substrato biologico; e di capire che codesto successo verrebbe a mancarci se alterassimo tale prezioso substrato […]. Agli occhi dell'antropologo […] appariscono così chiari i pericoli sempre più gravi degli sregolati contatti di razza […]. Sacrosanta è la crociata bandita per la difesa, anche in senso biologico, della nostra razza. Sarà anzi da dire fin da ora «guai ai trasgressori!» perché essi compromettono l'Italia di domani, quand'anche il loro malaffare si risolvesse - e non è poco! – nel legare ai posteri l'inscrollabile, penoso e pericoloso fardello dei bastardi in colonia[52].

Secondo la dottrina razzista del regime, l'incrocio con razze scadenti, tra cui la nera era quella inferiore al massimo grado, causava il decadimento delle superiori «qualità insite per motivi biologici nella nostra gente». I meticci erano espressione di degradazione biologica della razza bianca a seguito della contaminazione del sangue italiano con quello africano. A causa di questa impurità di sangue, gli italo-eritrei erano biologicamente inferiori e, in quanto tali, non potevano essere classificati come italiani: erano africani. In questa idea di inquinamento della superiore razza bianca trovò legittimazione la politica di africanizzazione dei meticci.

Il pacchetto normativo razziale coloniale, che precedette e accompagnò la ben nota legislazione razziale antisemita del 1938, è una pagina del razzismo di Stato fascista tuttora largamente negletta.

Italy, […] racism was embedded in everyday life rather than made explicit with written norms». M. Pretelli, *Education in the Italian colonies during the interwar period*, «Modern Italy», vol. 16, n. 3, 2011, p. 276.

51 Smith-Simonsen, *«…all'Ombra della Nostra Bandiera»*, cit., p. 152. Con la formula *not quite/not white* si intende che il possesso di attributi razziali misti – *not quite (white)* – rendeva impossibile l'assimilazione ai bianchi – *not white*.

52 Cipriani, *Razzismo*, cit., p. 12.

Il regio decreto-legge n. 1019 del 1936[53] abrogò il provvedimento del 1933 che, come abbiamo visto, consentiva ai meticci non riconosciuti di assumere la cittadinanza italiana (art. 28).

Il regio decreto-legge n. 880 del 1937[54] rese la coabitazione interraziale perseguibile penalmente: un italiano, qualora intrattenesse una relazione *more uxorio* con un'indigena, era passibile di detenzione da uno a cinque anni. Questo provvedimento, con la criminalizzazione dei contatti sessuali interrazziali, intendeva riaffermare quel divario di status tra italiani e africani che era fondamentale alla preservazione dei rapporti di dominio coloniale.

La legge n. 1004 del 29 giugno 1939[55], in nome della difesa della superiorità dell'uomo bianco, rafforzò ulteriormente la separazione tra italiani e africani. A titolo di esempio, divennero reati di lesione del prestigio della razza da parte di un cittadino italiano la frequentazione abituale di luoghi riservati alla popolazione indigena (art. 12) e la prestazione di lavoro subordinato a favore di sudditi coloniali (art. 13); la commissione di questi atti, «abusando della sua qualità di appartenente alla razza italiana o venendo meno ai doveri che da tale appartenenza gli derivano di fronte ai nativi», aveva l'effetto di «sminuire nel loro concetto la figura morale dell'italiano»[56].

La legge n. 822 del 13 maggio 1940[57] fu l'atto decisivo di segregazione razziale degli italo-eritrei: il meticcio «non può essere riconosciuto dal genitore cittadino» (art. 3); egli «assume lo statuto del genitore nativo ed è considerato nativo a tutti gli effetti» (art. 2)[58]. In altre parole, la popolazione italo-eritrea fu equiparata a quella indigena senza riguardo alcuno per la discendenza italiana da parte paterna.

Venendo allo specifico educativo, le previsioni normative furono le seguenti:

> Il mantenimento, l'educazione e l'istruzione del meticcio sono a totale ed esclusivo carico del genitore nativo [art. 5].
> Sono vietati gli istituti, le scuole, i collegi, i pensionati e gli internati speciali per i meticci, anche se a carattere confessionale. Gli istituti per nazionali non debbono accogliere meticci che possono essere accolti negli istituti, nelle scuole, nei collegi, nei pensionati e negli internati per i nativi. I contravventori sono puniti con l'ammenda fino a lire tremila; può essere inoltre disposta la chiusura degli istituti [art. 6][59].

[53] Regio Decreto-Legge 1° giugno 1936-XIV, n. 1019 - *Ordinamento e amministrazione dell'Africa Orientale Italiana*, in G.U. 13 giugno 1936, n. 136.

[54] Regio Decreto-Legge 19 aprile 1937-XV, n. 880 - *Sanzioni per i rapporti d'indole coniugale tra cittadini e sudditi*, in G.U. 24 giugno 1937, n. 145.

[55] Legge 29 giugno 1939-XVII, n. 1004 - *Sanzioni penali per la difesa del prestigio di razza di fronte ai nativi dell'Africa italiana*, in G.U. 21 luglio 1939, n. 169.

[56] *Ibid*., p. 3299.

[57] Legge 13 maggio 1940-XVIII, n. 822 - *Norme relative ai meticci*, in G.U. 17 luglio 1940, n. 166.

[58] *Ibid*., p. 2627.

[59] *Ibid*.

Così la popolazione italo-eritrea «si vide vietare l'accesso a scuole e altri istituti di carattere sociale ed educativo che storicamente avevano servito le comunità a retaggio misto»[60].

L'africanizzazione d'imperio degli italo-eritrei fu intesa a scongiurare il sempre paventato pericolo che il meticciato fungesse da «legame tra razze diverse», da «amalgama fra colonizzatori e colonizzati»[61]; per dirla con Tekeste Negash,

> from 1940 the Italian East African Empire was inhabited by the Italians and the natives with positions clearly defined and without any in-between groups such as half-castes and educated natives. […] By forbidding inter-racial cohabitation and by closing the possibility for [half-castes] to acquire Italian citizenship, Italy created two polarized communities, namely the rulers and the ruled. This polarization made the implemetation of native policy along 'apartheid' lines considerably easier to handle[62].

Conclusioni

Nell'osservazione della fenomenologia educativa nell'Eritrea italiana, il focus di questo saggio è stato puntato sulle determinazioni politiche nella gestione della questione della collocazione dei meticci all'interno dell'impostazione separatista della vita sociale coloniale. In Eritrea, per tutto il periodo dell'occupazione italiana, in linea con la prassi segregazionista in uso in tutta la società coloniale, anche il sistema di istruzione fu a doppio canale: scuole per i cittadini italiani, scuole per i sudditi coloniali. La presenza di italo-eritrei incrinava l'ossatura separatista dell'organismo coloniale; infatti, quelli che in maniera spregiativa venivano chiamati meticci creavano ambiguità in quanto non erano né del tutto italiani né del tutto africani. Come erano da categorizzare gli italo-eritrei? Come cittadini italiani? Come sudditi coloniali? A quali scuole dovevano avere accesso? A quelle a fruizione nazionale? A quelle a fruizione indigena? Fino al 1939, i pochi meticci riconosciuti dal padre italiano ebbero il diritto di frequentare le scuole a fruizione nazionale; inoltre, furono allestite ad hoc scuole a convitto a conduzione missionaria cattolica che impartivano un'educazione italiana; questi istituti erano aperti anche ai meticci non riconosciuti. Nella seconda metà degli anni Trenta, la strategia politica nei confronti degli italo-eritrei, da assimilazionista che era, degenerò in termini segregazionisti. Questo cambiamento avvenne sotto la spinta delle credenze pseudo-scientifiche che costituivano il corpus dell'ideologia razzista

60 P. Calchi Novati, *L'Africa d'Italia. Una storia coloniale e post-coloniale*, Roma, Carocci, 2011, p. 246.

61 Marchitto, *La difesa della razza nell'Impero*, cit., pp. 23 e 19.

62 Negash, *Italian Colonialism in Eritrea*, cit., pp. 109 e 110.

del fascismo. Secondo la dottrina razzista del regime, i meticci, in quanto impuri di sangue, erano espressione di uno scadimento biologico; di conseguenza, non potevano essere ritenuti italiani: erano africani. Così, con la legge n. 822 del 1940, l'accesso alle scuole a fruizione nazionale fu interdetto agli italo-eritrei, mentre gli istituti missionari cattolici per il meticciato furono vietati. I giovani di razza mista potevano frequentare solo le scuole per i nativi.

Il presente saggio, sebbene tenti di contribuire alla focalizzazione dello sguardo storico, dalla prospettiva educativa, sulla questione dei meticci nell'Eritrea italiana, lascia ancora molto di inesplorato. Che trattamento era riservato agli italo-eritrei che frequentavano le scuole a fruizione nazionale? Quali erano le pratiche didattiche nelle scuole a convitto gestite dai missionari cattolici appositamente per i giovani *di sangue misto*? Qual era il destino sociale degli italo-eritrei non riconosciuti, una volta usciti da questi istituti? Che cosa raccontano i discendenti dei meticci che nacquero durante l'occupazione italiana a proposito dell'esperienza scolastica dei parenti? La curiosità euristica destata da questi interrogativi potrebbe produrre ulteriori, provvidi, avanzamenti della ricerca sul tema dell'educazione degli italo-eritrei durante il periodo coloniale.

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La «scuola attiva» a Mogliano. Riflessione pedagogica e pratica didattica nell'attività magistrale di Giovanni Lucaroni (1934-1956)

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The «active school» in Mogliano. Pedagogical reflection and teaching practice in the professional activity of the teacher Giovanni Lucaroni (1934-1956)

ABSTRACT: This paper aims to continue the reconstruction of the intellectual and professional biography of the teacher Giovanni Lucaroni, who was increasingly inspired by the activist educational principles and practices promoted by Giuseppe Lombardo Radice in the primary school programs of 1923. Despite the substantial and profound changes in the school, Lucaroni will be able to preserve the «active school» in which he believed. In this paper the analysis of publications, programs and school chronicles, from the 1930s until the advent of democracy, is proposed in order to highlight educational conception and teaching methodology of the teacher who worked for more than fourty years in the primary school of Mogliano, near Macerata.

EET/TEE KEYWORDS: Giovanni Lucaroni; Primary school; Teaching practice; Italy; XXth Century.

Introduzione

Il presente contributo intende proseguire la ricostruzione della biografia intellettuale e professionale del maestro marchigiano Giovanni Lucaroni[1], il

[1] Per la prima parte della biografia intellettuale e professionale del maestro Giovanni Lucaroni, si veda: L. Paciaroni, *La «scuola serena» a Mogliano. Riflessione pedagogica e pratica didattica nell'attività magistrale di Giovanni Lucaroni (1923-1934)*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 1003-1032.

quale, dopo aver conseguito il diploma magistrale nel 1910 presso la Scuola normale di San Ginesio, esercita la professione magistrale, per oltre quaranta anni, nella scuola elementare di Mogliano, comune dell'entroterra maceratese[2].

Come già ricostruito, Lucaroni, all'indomani dell'entrata in vigore della riforma Gentile del 1923, si dimostra un convinto sostenitore dei principi dell'attivismo pedagogico propugnati nei programmi scolastici redatti dal pedagogista Giuseppe Lombardo Radice.

Il maestro marchigiano non solo applica gli innovativi principi pedagogici in classe ma diventa anche una guida preziosa per i colleghi in ogni parte del Paese. Infatti, Lucaroni interpreta e illustra i contenuti di tali programmi attraverso numerosi articoli – pubblicati su importanti riviste magistrali, tra cui «L'Educazione Nazionale» e «La Tecnica Scolastica» –, e alcune sue pubblicazioni come *Per la scuola*[3] e *L'insegnamento della lingua nelle scuole elementari*[4], le quali sono oggetto di recensioni su diverse riviste[5].

Gli scritti del maestro moglianese ricevono ampi consensi da parte di colleghi, ispettori e direttori didattici ma sono apprezzati anche dallo stesso Lombardo Radice e da Alfredo Saraz, fondatore de «La Tecnica Scolastica», con i quali l'insegnante ha un fitto scambio epistolare, tra il 1924 e il 1928. Lucaroni, nel 1926, insieme al collega e amico Nicola Ripamonti, pubblica anche un supplemento all'almanacco regionale[6] che attira l'attenzione del

[2] Sulla biografia di Lucaroni, si veda: Paciaroni, *La «scuola serena» a Mogliano*, cit., p. 1005; J. Meda, *Giovanni Lucaroni*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionaro biografico dell'educazione, 1800-2000*, 2 voll., Milano, Editrice Bibliografica, 2013, Vol. 2, pp. 58-59.

[3] G. Lucaroni, *Per la nuova scuola*, Montegiorgio, Tip. Carlo Zizzini, 1927.

[4] Id., *L'insegnamento della lingua nelle scuole elementari*, Montegiorgio, Tip. Carlo Zizzini, 1928.

[5] Per esempio, solo per citarne alcune, «Scuola fascista», «I diritti della scuola», «La Nuova Scuola Italiana» e «Scuola Italiana Moderna». All'interno del fondo «Giovanni Lucaroni» in CESCO, serie «Recensioni e giudizi», sono conservate anche numerose lettere in cui sono espressi giudizi positivi sull'attività del maestro marchigiano, molte delle quali da parte di colleghi, tra cui Ada Natali, maestra anch'essa marchigiana, la quale partecipa alla Guerra di Liberazione nelle file della Resistenza dopo l'8 settembre 1943 e diventa, nel 1945, una delle prime donne a ricoprire la carica di sindaco in Italia. La maestra scrive a Lucaroni dalla frazione Apezzana di Loro Piceno, in provincia di Macerata, l'11 maggio 1935 per ringraziarlo dei libri che le ha inviato, sottolineando che ha «letto d'un fiato 'A fior di labbro' e non le so dire se più abbia ammirato l'eleganza e la spigliatezza dello stile o la fine ironia delle pagine così schietta» ed esprime «la sua ammirazione» pregandolo di «continuare nella Sua nobile fatica per la gioia di quanti amano la scuola e la verità», in CESCO, Fondo «Giovanni Lucaroni», serie «Recensioni e giudizi», c. 18. Sulla figura di Ada Natali, si veda: P. Gabrielli, *Declinare la cittadinanza. Politiche e pratiche delle donne nella ricostruzione*, in P. Giovannini, B. Montesi, M. Papini (edd.), *Le Marche dalla ricostruzione alla transizione, 1944-1960*, Ancona, Il lavoro editoriale, 1999, pp. 85-91; R. Ferrara, *La rappresentanza femminile nelle istituzioni (1946-1963)*, in *ibid*., pp. 107-123; P. Gabrielli, *"Rimbocchiamoci le maniche". Ada Natali, maestra, partigiana, sindaco*, in P. Giannotti, S. Pivato (edd.), *Per Enzo Santarelli. Studi in onore*, Ancona, Consiglio Regionale delle Marche, 2005, pp. 317-353.

[6] G. Lucaroni, N. Ripamonti, *Mogliano: leggenda, storia, dialetto*, Montegiorgio, Tip. Carlo Zizzini, 1926. Sugli almanacchi regionali, si vedano: M. D'Alessio, A. Barausse, *"Dalla piccola alla grande patria". Libri dialettali e almanacchi regionali per la scuola elementare*, in G. Chiosso (ed.),

pedagogista catanese, tanto da dedicargli una recensione sulla rivista «Scuola Italiana Moderna» nella quale lo definisce un «importante perfezionamento dello studio regionale» e invita i maestri a mettersi «sulla via indicata da Lucaroni e Ripamonti»[7].

Questa parte della vita magistrale del maestro Lucaroni è stata presentata attraverso l'analisi di diverse tipologie di fonti, le quali si sono rivelate risorse preziose per ricostruire anche la sua attività professionale dall'inizio degli anni Trenta fino al 1956, anno in cui viene collocato a riposo. La ricerca è stata condotta esaminando una ricca documentazione conservata nell'archivio personale del maestro (tra cui lettere, appunti, fotografie, manoscritti, ritagli di giornale)[8] e nell'archivio scolastico dell'Istituto comprensivo «Giovanni XXIII» di Mogliano, all'interno del quale è stato possibile consultare le buste in cui sono conservati i registri di classe, dal 1910 al 1956, e il fascicolo personale del maestro moglianese.

Gli articoli, i documenti personali, le cronache scolastiche e le relazioni che il maestro marchigiano lesse in occasione di convegni didattici hanno permesso di analizzare e riflettere sulle sue idee e sui suoi metodi nel momento in cui quei principi innovativi lombardiani, che aveva accolto e sperimentato con entusiasmo nella scuola moglianese, furono spazzati via dal crescente processo di fascistizzazione della scuola e dai cambiamenti sostanziali introdotti dai programmi scolastici del 1934. Inoltre, hanno consentito di mettere in luce anche l'applicazione dei programmi emanati all'indomani dell'avvento della democrazia, quando il maestro finisce tra le maglie del processo di epurazione promosso dall'Alto Commissariato per le Sanzioni contro il Fascismo.

1. *La fascistizzazione della scuola e la «scuola attiva» di Lucaroni (1934-1943)*

Il maestro Lucaroni, dopo aver mostrato grande entusiasmo nei confronti dei programmi scolastici del 1923 ed essere stato autore di pubblicazioni in cui

TESEO '900. Editori scolastico-educativi del primo Novecento, Milano, Editrice Bibliografica, 2008, pp. XXXI-LIV; R. Sani, *«Alla scoperta dell'Italia migliore e più ignorata». Gli Almanacchi regionali per la scuola elementare introdotti dalla riforma Gentile e l'utilizzo del patrimonio culturale e naturale per la promozione dell'identità nazionale e del sentimento di cittadinanza*, in D. Caroli, E. Patrizi (edd.), *«Educare alla bellezza la gioventù della nuova Italia». Scuola, beni culturali e costruzione dell'identità nazionale dall'Unità al secondo dopoguerra*, Milano, FrancoAngeli, 2017, pp. 87-115.

[7] G. Lombardo Radice, *Osterfingen e Mogliano ovvero: delle "Guide locali" nelle scuole*, «Scuola Italiana Moderna», n. 10, 3 dicembre 1927, pp. 68-69.

[8] L'archivio privato di Giovanni Lucaroni è stato donato all'Universita degli Studi di Macerata nel 2012 dalla nipote Maria Agostina Marzioli ed è attualmente conservato nell'omonimo fondo presso il Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia (d'ora in avanti: CESCO).

cercava di far conoscere e far comprendere la «scuola nuova» propugnata da Lombardo Radice, continua – dall'inizio degli anni Trenta – a esporre le proprie idee attraverso alcuni articoli pubblicati in riviste come «Toga Praetexta» e «La Diana scolastica» e le relazioni presentate in occasione di convegni didattici[9]. Non si riscontrano, invece, libri pubblicati sul tema.

L'insegnante marchigiano, infatti, dal 1932 al 1939, espone le sue posizioni nei confronti delle novità introdotte nella scuola: dai programmi scolastici del 1934 all'ingresso della radio nelle aule, fino alla critica nei confronti dei nuovi metodi che iniziano ad attecchire anche in Italia, come il metodo globale. Inoltre, dall'analisi di articoli e cronache scolastiche riportate nei registri di classe, è evidente la sua disapprovazione nei confronti dell'introduzione del testo unico di Stato.

In un articolo pubblicato nel 1932 nella rivista «La Diana scolastica»[10] il maestro marchigiano dimostra di essere ancora un convinto sostenitore dei valori e dei principi cari a Lombardo Radice e affronta l'idealismo sostenendo che questa concezione, trasferita nella pratica dell'educazione moderna, ha vissuto «due tipici momenti di esagerazioni: dubbi, riserve, critiche e sarcasmi in principio; entusiasmi, dedizioni, lirismi e… verbalismi a iosa in un immediato prosiego»[11] e, di conseguenza, l'alunno è stato prima considerato come «discolo, elemento passivo da fare», per poi essere visto come «un piccolo idolo pretenzioso, da ammirare, venerare, esaltare, invidiare e… sopportare con evangelica rassegnazione»[12].

Lucaroni, convinto che il fanciullo non abbia senso estetico, – inteso come «peculiare atteggiamento dell'anima di fronte alle manifestazioni dell'arte, della natura, della vita, attraverso le quali lo spirito realizza poco o molto di sé»[13] – sostiene che sia il maestro a doverlo infondere e «far sì che il fanciullo possa un giorno sentirsi qualcuno, quando sentirà le corde dell'anima vibrare tormentosamente deliziose al soffio delle superiori manifestazioni dell'umano intelletto»[14].

Il maestro Lucaroni ribadisce ciò che aveva già sostenuto negli anni precedenti[15], ossia l'importanza del ruolo del maestro, al di là dei programmi scolastici da seguire e dei testi da adottare. Il maestro ha il fondamentale compito di educare le nuove generazioni, così come quello di infondere il senso estetico, senza 'guastarlo' ed evitando di avviare il fanciullo a una «imperdonabile faciloneria dilettantistica» adottando un atteggiamento

[9] Lucaroni ha raccolto i testi delle sue relazioni e dei suoi articoli scritti tra il 1932 e il 1939 in un fascicolo con pagine numerate, oggi conservati in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti vari», c. 13.

[10] G. Lucaroni, *Posizioni*, «La Diana scolastica», sezione «La Didattica», n. 6, 1932, pp. 1-2.

[11] *Ibid*., p. 1.

[12] *Ibid*.

[13] *Ibid*.

[14] *Ibid*., p. 2.

[15] Si veda, ad esempio, Lucaroni, *L'insegnamento della lingua nelle scuole elementari*, cit.

baroccamente ammirativo per uno scarabocchio che chiamiamo arte, per quattro spropositi che qualifichiamo genialità linguistica, per delle proporzioncelle striminzite dietro le quali ci affanniamo a cercare l'estetica, la morale, la fede, i segni del genio, le smaglianti luminosità di eccezionali creazioni di là da venire. Lavoro, disciplina, serietà di intenti, opere e non parole paroline e parolone; attività, e non le troppe ridicole commedioline che fioriscono numerose e parassitarie intorno al ceppo dell'educazione. Così l'educazione ha un senso, un contenuto, un valore e… una responsabilità di cui non è pur comodo disfarsi per gettarla di peso sulla debolezza costituzionale dell'autonomia, della spontaneità e della naturale anarchia dell'anima infantile[16].

Della scuola di quegli anni Lucaroni critica fortemente – e in diverse occasioni – il testo unico di Stato introdotto nel 1929. Per esempio, nel registro di classe dell'anno scolastico 1932/33, scrive:

Quei libri di Stato verranno a giorni – purtroppo – e ci penso con un peso… come se mi gravasse sullo stomaco. Che ne farò, che ne faranno i ragazzi delle 600 e più pagine di trattati che formano il sussidiario? Quando si decideranno a tagliarne via 3/4?[17]

Ripropone la sua critica nei confronti dei testi scolastici in un articolo pubblicato il 30 ottobre 1934 in «Toga Praetexta»[18], nel quale Lucaroni affronta i contenuti dei programmi entrati in vigore in quell'anno scolastico, sostenendo che il male di cui generalmente gli insegnanti si lamentavano non era tanto nei programmi, quanto invece nei trattati, ossia nei libri che secondo lui erano «rimpinzati, infarciti, inadeguati, voluminosi e costosi, condannati per la loro sproporzione fin dal primo apparire ed ora ufficialmente decretati al rifacimento *ab imis*»[19].

Nell'articolo il maestro marchigiano sembra apparentemente impassibile di fronte ai programmi promulgati dal ministro Ercole:

La stampa quotidiana ha fatto or ora conoscere le attese modifiche ai programmi di studio per le scuole elementari. A quanti mi han chiesto: – Cosa c'è di nuovo? – io ho francamente risposto: – Nulla. – [20]

Secondo Lucaroni le nozioni introdotte da questi programmi non hanno «alcun valore di contro alla irremovibilità della 'Premessa' e cioè dello spirito che dal 1923 aleggia o dovrebbe aleggiare nei meandri della scuola italiana»[21]

16 Id., *Posizioni*, cit., p. 2.

17 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 24 settembre 1932, in Archivio scolastico dell'Istituto Comprensivo "Giovanni XXIII" di Mogliano (d'ora in avanti: ASICM), busta «Mogliano Registri classe 1932-33», Registro di classe dell'anno scolastico 1932/33.

18 G. Lucaroni, *Premessa*, «Toga Praetexta», 30 ottobre 1934, pp. 367-368.

19 *Ibid*., p. 367.

20 *Ibid*.

21 *Ibid*.

e afferma che «questa revisione ha soprattutto il sapore di una completa e indiscutibile conferma»[22].

Per il maestro marchigiano non è necessario affannarsi sopra i nuovi programmi con note, richiami, confronti, bibliografie e quesiti, in quanto starebbe a significare «una radicata ed incorreggibile incomprensione di principi» che poi si traduce in «errata, imperfetta e gretta applicazione pratica»[23].

Il programma deve contenersi nei limiti di una sintesi di base e «non deve tradursi in orario-prontuario-guida, che irretisca maestri ed alunni in un groviglio di passi obbligati, di dande e di vicoli chiusi»[24]. Lucaroni dimostra, ancora una volta, che la scuola, per lui, non è solo quella dei programmi e dei libri di testo e sostiene che quando l'insegnante nota nei suoi alunni «occhi assenti, lontani, forse anche ostili», sono dovuti

> anche alla mancanza da parte dell'insegnante di quel vincolo e quel fascino che nessun programma sapientemente artificioso e nessun trattato han mai dato in prestito a nessuno, senza di che la scuola non è scuola, mai, ma penosa convivenza di estranei in attesa di correr via, liberi e soli, nell'ebbrezza della luce, del moto, del rifiorire di canti alle avide bocche, su, dai cuori avidi di bellezza[25].

Nonostante la reazione di Lucaroni evidenzi come il maestro non trovi differenze tra i programmi del 1923 e del 1934, questi ultimi, – anche se formalmente sembrano non aver mutato l'impostazione di quelli precedenti –, sostanzialmente sono «indicativi del mutamento di clima intervenuto rispetto al momento in cui erano stati elaborati quelli precedenti» e «vanno a svuotare gli indirizzi pedagogici e didattici che avevano caratterizzato la scuola gentiliana»[26], stravolgendo il senso e lo spirito dei programmi dell'idealismo. La scuola, infatti, inizia a convertirsi in uno strumento di propaganda ideologica di massa indispensabile per l'edificazione dell'*uomo nuovo* fascista[27].

Per quanto Lucaroni – come risulta anche dai registri di classe presentati successivamente – assuma un atteggiamento ineccepibile nei confronti del regime, rispettando le disposizioni governative e gli ordini dei superiori, continua a considerare il maestro, forza viva della scuola, al di sopra dei programmi e dei testi scolastici. Lucaroni questa forza la dimostra giorno dopo giorno, anche di fronte alle classi svogliate e indisciplinate. Per esempio, nel 1933, in un articolo pubblicato in «La Diana scolastica»[28], fa riferimento alla sensazione di amarezza provata dai colleghi nei confronti degli scarsi risultati ottenuti a fine

[22] *Ibid*.
[23] *Ibid*.
[24] *Ibid*., p. 368.
[25] *Ibid*.
[26] 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. 221.
[27] *Ibid*., pp. 220-221.
[28] G. Lucaroni, *La raccolta*, «La Diana scolastica», sezione «La Didattica», n. 17, 1933, pp. 1-2.

anno. Il maestro, però, non pensa che ci sia «crisi d'intelligenza né crisi di buona volontà; c'è reazione, ribellione, coalizione, resistenza passiva ampiamente e profondamente organizzata contro la tenace, cocciuta, infelicissima mania di voler fare della fanciullezza un aborto di maturità culturale e scientifica»[29]. Sono, quindi, i programmi e i libri scolastici che «seguitano a soffocare la scuola, mentre gli alunni se la ridono, battono in ritirata strategica», lasciando maestri e superiori alle prese con programmi e trattati[30].

Lucaroni ribadisce con fermezza la poca utilità di testi che richiedono all'alunno di accogliere nella sua mente «ancor vaneggiante e fluttuante nel nimbo dei giuochi e dei sogni» tutti gli elementi dello scibile umano, dalla storia all'arte, dalla religione alla scienza, dalla geografia alla morale, dalla matematica alle regole della lingua, allo sport, alla cosmografia, alla politica[31]. Il maestro marchigiano è convinto che «ogni elemento dell'umano sapere debba entrare nella scuola»[32], ma l'alunno di quinta classe non è in grado di apprendere nulla nel momento in cui gli si chiede di compiere una «marcia forzata, affaticante e snervante» studiando un numero eccessivo di pagine[33].

Per il maestro moglianese, ai fini dell'apprendimento, è necessario semplificare e quindi, «l'unica soluzione è quella di sfrondare, tagliare, proporzionare; ed il buon seme tornerà a dare i buoni frutti»[34]. L'anno successivo, nel 1934, insiste sul bisogno di eliminare un po' di «carta nelle nostre scuole», da gettare insieme a quant'altro c'è «d'inutile, di accidioso, di grettamente tradizionalistico», in quanto «la scuola fascista, sorretta dalla più fascista delle riforme fasciste, salda e intatta come s'è ancor oggi dimostrata, è anima, è opera, è vita e non parole»[35].

Nella scuola, inoltre, secondo Lucaroni, si inizia ad assistere a una standardizzazione che lo preoccupa. Ne parla in maniera chiara e approfondita in un articolo intitolato proprio *Standard = Instruction*[36] nel quale denuncia

> l'uniformità di movimenti sanciti da opuscoli di ginnastica tipo nazionale; uniformità di nozioni e di lezioni consacrate dai libri di stato; uniformità di esercitazioni pratiche suggerite dalla sapienza didattica delle riviste, fatte proprie, come verbo, dalla maggioranza dei maestri e dei dirigenti; uniformità di sapere, di metodo, di sviluppi, di critica, di analisi, di valutazioni; formulari, schemi, schedari, falsarighe, calchi, casellari, numeri… cose![37]

L'amarezza di Lucaroni nei confronti di questo sistema è evidente quando esprime la sua tristezza pensando che nello stesso momento «centomila maestri

[29] *Ibid.*, p. 1.
[30] *Ibid.*
[31] *Ibid.*
[32] *Ibid.*
[33] *Ibid.*, p. 2.
[34] *Ibid.*
[35] Lucaroni, *Premessa*, cit., p. 368.
[36] Id., *Standard = Instruction*, «Toga Praetexta», 15 gennaio 1934, pp. 17-18.
[37] *Ibid.*, p. 17.

e cinque milioni di scolari stiano tormentandosi a vicenda intorno allo stesso piccolo pensiero forse con le stesse parole, certo con gli stessi mezzi!»[38]. Il maestro marchigiano guarda con apprensione anche al futuro, esprimendo il suo «disagio» nel pensare

a quel vicino e affannosamente preconizzato domani in cui io – il maestro, l'educatore, il forgiatore d'anime – […] io – la forza viva e palpitante d'una viva e palpitante unità – sarò più tenacemente ammanettato di quel che già non mi sia, ed imbavagliato, perché in tutte le scuole, in certi giorni ed in certe ore (e perché poi non addirittura sempre?!…) farà lezione la radio, assurda meccanizzatrice del pensiero, dell'arte, dell'anima nelle sue più elette manifestazioni[39].

La preoccupazione di Lucaroni per quanto riguarda l'avvento della radio nelle aule scolastiche diventa ben presto realtà[40]. Infatti, nel 1938, in occasione dei convegni didattici di Macerata e Camerino, tenutisi il 13 e 14 ottobre, viene affidato al maestro Lucaroni il compito di tenere una relazione dal titolo *La radiofonia scolastica*[41], nella quale presenta questa novità ripercorrendone la storia e dando indicazioni sul suo utilizzo secondo quanto previsto dal Ministero dell'Educazione Nazionale. Il maestro riconosce «il febbrile dinamismo del fascismo», definisce il Duce «l'anticipatore come sempre di tutti i tempi e di tutti gli eventi» e riconosce i progressi della tecnologia ma, nelle sue parole e nel pensiero, è sempre viva l'idea del maestro che deve essere «al centro dell'apostolato educativo» e responsabile della formazione delle generazioni.

Il maestro esorta sempre ad agire con equilibrio, proporzione e misura perché «assurda e vana sarebbe ogni pretesa di sostituzione, di meccanizzazione e di standardizzazione»[42]. Per Lucaroni ormai la scuola sta procedendo verso una standardizzazione nelle lezioni, nel programma, nei quaderni, nei libri, nelle cerimonie e, addirittura, nell'educazione e non apprezza questo sistema in quanto «la vita dello spirito ha le sue esigenze di dinamismo, di peculiarità, di efficienza»[43] e

la vita della scuola è essenzialmente vita e divenire dello spirito; non la si può ridurre a rigidi schemi generali né a sintesi determinate a priori a cui non si possa giungere che a traverso analisi particolari, preordinate e disposte dalla indiscutibile sagacia di qualche teorico[44].

[38] *Ibid.*
[39] *Ibid.*
[40] Più in generale, sulla radiofonia scolastica si vedano gli studi condotti da Carla Ghizzoni (*La radio per ragazzi nei primi anni del fascismo (1925-1933)*, «History of Education & Children's Literature», vol. XIII, n. 2, 2018, pp. 219-250) e da Sara Zambotti (*La scuola sintonizzata: pratiche di ascolto e immaginario tecnologico nei programmi dell'Ente Radio Rurale (1933-1940)*, Torino, Trauben, 2007).
[41] Relazione di Giovanni Lucaroni intitolata *La radiofonia scolastica*, in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti vari», c. 13, pp. 2-11.
[42] *Ibid.*, p. 2.
[43] Lucaroni, *Standard = Instruction*, cit., p. 17.
[44] *Ibid.*

«L'educazione ha le sue esigenze», sostiene Lucaroni e i maestri, «coscienti della responsabilità dell'opera delicatissima a cui la Nazione li chiama», hanno il compito di utilizzare la «più preziosa, più efficace» ma anche la «più pericolosa arma dell'educazione: la libertà»[45], la quale, però, si scontra con quell'uniformità che «uccide lo slancio», ma anche «con la lettera che soffoca lo spirito e la quantità che va a detrimento della qualità»[46]. Quindi, il maestro, tra la prolissità dei testi, le noiose leziosaggini delle riviste, le ordinanze, le esigenze e le intransigenze dei superiori, sembra che «si sfibri, si accasci, si umili e finisca per attaccare troppo supinamente l'asino dove vuole il padrone anche se qualche volta si sentirebbe proprio il prurito di fare il contrario»[47].

Obbedire sì, secondo Lucaroni, ma bisogna anche essere pronti «a comandare, a decidere, a osare, a intraprendere e a marcare anche il passo in un momento di fugace smarrimento», senza essere costretti a dover eseguire un ordine di servizio «che vien di troppo lontano, quando forse chi lo compila non conosce né la posizione, né le contingenze, né l'efficienza, né l'armamento, né il collegamento della pattuglia che avanza»[48].

È ricorrente negli articoli di Lucaroni la centralità attribuita al ruolo del maestro, il quale deve sempre sentire la bellezza della sua opera e non deve sentirsi «pezzo di ricambio costruito in serie»[49] così come non deve lasciare che la tanta carta presente a scuola lo offuschi. Il maestro nota che il suo registro di classe pesa ancora, ironizzando sul fatto che «potrebbe essere, in caso di necessità, un eccellente corpo contundente»[50]. Il giudizio critico del maestro è evidente nei termini che usa, parlando di programmi «prolissi», «che non ho mai capito né a chi servano né a che servano». Con ironia parla anche del posto dedicato alla cronaca delle scuole «che col tempo le tarme insonni ci scriveranno meravigliose istorie di non so quali meravigliosi personaggi!»[51].

Per Lucaroni è inutile, come aveva già evidenziato in altri scritti, anche la carta dei libri scolastici che «contano quel rispettabile numero di pagine che tutti sanno e che nessuno riesce a leggere, spiegare, capire, imparare»[52]. Stesso giudizio verso i quaderni che, alla fine dell'anno, hanno «due terzi o giù di lì delle vergini pagine che restano forzatamente zitelle»[53]. La carta 'che pesa' secondo Lucaroni è anche quella degli «ordini, le circolari, i verbali, gli elenchi, le solite reiterate statistiche, gli albi, le geniali orribili decorazioni cartacee, le multiformi, multicolori e scoccianti riviste didattiche»[54]. Alla scuola, secondo

[45] *Ibid.*, pp. 17-18.
[46] *Ibid.*, p. 18.
[47] *Ibid.*
[48] *Ibid.*
[49] *Ibid.*
[50] G. Lucaroni, *Sanzioni*, «Toga Praetexta», 1° maggio 1936, pp. 111-112.
[51] *Ibid.*, p. 112.
[52] *Ibid.*
[53] *Ibid.*
[54] *Ibid.*

il maestro moglianese, basterebbe «un piccolo registro, dei piccoli (di mole) libri di chiara, concisa cultura; un solo quaderno per le esercitazioni che cronologicamente sviluppa e… il maestro. Di questo proprio, checché ne pensi qualcuno, credo non ne possa fare a meno»[55].

In questa frase si evidenzia come il maestro, per Lucaroni, rappresenti una risorsa centrale e fondamentale per l'apprendimento a scuola. Il maestro deve scegliere i propri metodi e i propri mezzi e non deve affidarsi alle nuove teorie che, negli anni Trenta, iniziano a riscuotere un certo successo nella scuola italiana, come i centri di interesse, definiti da Lucaroni – in un articolo pubblicato in «Toga Praetexta»[56] – una delle «tante altre baggianate che ogni tanto mi buttan dentro la scuola»[57].

Nel 1935 Lucaroni, ironicamente, definisce, il successo dei centri di interesse «un colpo di fortuna» e lo paragona addirittura ai successi delle «tante stupide canzoni-fox o canzoni-tango che ossessionano le gambe delle giovinezze nevrotiche di tutti i paesi del mondo»[58].

Dietro a toni e accostamenti ironici, emerge chiaramente una profonda critica nei confronti del metodo globale, apprezzato invece da una parte della classe magistrale. Il maestro marchigiano evidenzia come gli insegnanti non abbiano mai pensato ai centri di interesse ma bensì 'al centro'. Centro inteso come «l'anima, con le sue leggi eterne, coll'inafferrabile fascino dell'essere suo e del suo divenire, con la potenza divinizzatrice di sé e del suo mondo: cosa fragile e incorruttibile a un tempo, reale e chimerica, dolce e terribile, da venerare e frustare, da incitare e da incatenare»[59]. Insomma, per Lucaroni i centri di interesse non sono altro che «schemi falsi», «non sono la verità del sapere, non sono la sintesi», ma vanno considerati come «una sintesi forzatamente provvisoria e scheletrica di una verità obiettivata, di una povera o ricca conquista di qualche anno di studio, di alcuni anni di esperienza e una dozzina d'ore di… assillo per calcificare il tuo pensiero e la tua anima»[60].

Pensiero e anima sono i due elementi che Lucaroni cerca, per tutta la sua vita magistrale, di mantenere vivi, tentando di non vederli confinati in rigidi schemi preconfezionati. I principi che lo animano durante il corso degli anni Venti e che lo avevano spinto a pubblicare alcuni libri sul tema della scuola, continuano ad incoraggiarlo negli anni successivi e questo aspetto è evidente laddove si confrontano i suoi scritti a distanza di dieci anni.

Per esempio, nel mese di giugno del 1939, il maestro Lucaroni viene invitato come relatore al convegno didattico di Corridonia[61] sul tema *L'insegnamento*

[55] *Ibid.*
[56] G. Lucaroni, *Colpi di fortuna*, «Toga Praetexta», 15 gennaio 1935, pp. 65-68.
[57] *Ibid.*, p. 65.
[58] *Ibid.*
[59] *Ibid.*, pp. 66-67.
[60] *Ibid.*, p. 67.
[61] Il convegno si è tenuto nel mese di giugno del 1939 e la relazione *L'insegnamento della lingua*

della lingua nelle scuole elementari, argomento che il maestro marchigiano aveva già affrontato in una sua pubblicazione del 1928[62].

Il libro di Lucaroni *L'insegnamento della lingua nelle scuole elementari* aveva ricevuto numerose recensioni positive all'indomani della sua pubblicazione[63] e notevoli apprezzamenti da parte di ispettori, direttori didattici e colleghi, ma anche da vere e proprie autorità come Saraz e Lombardo Radice, il quale nel paragrafo del suo *Problema dell'educazione infantile*[64], intitolato *Studi didattici intorno alla riforma della scuola*, dopo aver citato tra i lavori piu significativi che espongono la riforma didattica del 1923, tra i tanti, *Per la nuova scuola* di Lucaroni, segnala anche il «pregevole volume su *L'insegnamento della lingua*».

Confrontando la pubblicazione del 1928 e il testo della relazione letta al convegno è interessante notare come, a dieci anni di distanza, siano riportate le stesse idee e interpretazioni, senza ovviamente il riferimento ai programmi redatti da Lombardo Radice, presente, invece, nel libro, ma con l'aggiunta di riferimenti al Duce, colui che «dà mirabili esempi a noi e al mondo», al fascismo e alla *Carta della scuola*[65]. Sull'insegnamento della lingua, Lucaroni utilizza le stesse identiche parole in entrambi i testi, sostendo che «per insegnar lingua dobbiamo abolire l'insegnamento della lingua in quanto la lingua non è una materia d'insegnamento fra le molte, troppe materie d'insegnamento»[66].

L'alunno, secondo il maestro marchigiano, entra a scuola con un patrimonio di idee, di cognizioni, dalle quali non si può, non si deve prescindere e vi entra con un suo patrimonio linguistico e con un piccolo mondo di esperienze personali. Il maestro non deve distruggere tutto ciò con un atto di arbitrio, ma il suo compito è quello di «ordinare, rassettare, correggere, sostituire ed incanalare verso quella norma di lavoro comune che crea la disciplina esteriore, la disciplina interiore, la necessaria adesione ad un superiore imperativo, e la possibilità di una feconda convivenza scolastica»[67].

Il maestro deve pretendere che ogni parola dell'alunno sia italiana, così come la frase linguisticamente e grammaticalmente esatta, ma anch'egli deve dare il buon esempio, regolando il proprio linguaggio quando corregge, spiega,

nelle scuole elementari è conservata all'interno del fascicolo contenente altri testi del maestro, in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti vari», c. 13, pp. 12-25.

62 Lucaroni, *L'insegnamento della lingua nelle scuole elementari*, cit.

63 Per esempio, le recensioni pubblicate su «La Nuova Scuola Italiana», n. 23, 1929, p. 684; «Scuola Fascista», n. 23, 1929, p. 15; «I diritti della scuola», n. 21, 1929 e «La Scuola Italiana Moderna», n. 25, 1929.

64 G. Lombardo Radice, *Il problema dell'educazione infantile*, Firenze, La Nuova Italia Editrice, 1928, p. 231.

65 G. Lucaroni, *L'insegnamento della lingua nelle scuole elementari*, relazione tenuta al convegno didattico di Corridonia, in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti vari», c. 13, p. 14.

66 *Ibid*., p. 13.

67 *Ibid*., p. 15.

ammonisce e racconta. Tutto ciò non deve offuscare tuttavia la personalità dell'alunno, né la sua spontaneità.

Le stesse parole usate nel 1928 vengono riproposte in questa relazione per quanto riguarda la lettura, «che sia sentimento, poesia, armonia, fede, arte, musica; ecco, soprattutto musica». Il maestro marchigiano mette poi anche qui in guardia dall'utilizzo dei libri di lettura, in quanto

> tutt'altro che adatti alla bisogna; che i così detti sussidiari sono anch'essi dei libri da dover essere letti, mentre sembrano fatti apposta per non poter esser letti e solo spirano un senso di forte repulsa, che la scola attende ancora i suoi libri, il suo giornale, la sua letteratura, agile, sobria, nuova, accessibile, rettilinea, starei per dire espressiva che s'adegui sul serio a quel dinamismo di cui la giovinezza vuol essere la più genuina incarnazione.

In questa relazione troviamo anche uno spazio dedicato al diario, considerato da Lucaroni «esercizio libero e personale»[68]. Il maestro lo considera uno strumento attraverso il quale l'alunno debba esprimere semplicemente se stesso, con osservazioni, impressioni e fatti. Ultimo tema che affronta in questa relazione è quello dell'insegnamento della grammatica, argomento già presentato nel suo libro del 1928 e che tratta allo stesso modo: la grammatica si insegna con la lingua e in funzione della lingua nella sua pratica quotidiana.

Il discorso di Lucaroni viene fatto a pochi mesi di distanza dall'approvazione e promulgazione da parte del Gran Consiglio del Fascismo della *Carta della scuola* del Ministro dell'Educazione Nazionale Giuseppe Bottai, definita da Luigi Volpicelli come «l'approfondimento e la continuazione dei principi direttivi del 1923, o meglio, una conquista che quei principi, divenuti sostanza viva e comune certezza della scuola italiana, hanno operato; ma è anche il frutto di una vasta trasformazione della vita ideale e sociale italiana, operatasi in questi venti anni»[69].

Secondo Lucaroni la *Carta della scuola* non contiene una riforma ma «una organica concezione politico-sociale sulla quale ogni ulteriore sviluppo dell'attività educativa delle nuove generazioni dovrà inserirsi e potenziarsi». Il documento politico-programmatico, scrive il maestro moglianese, «ha dato alla scuola fascista nuovi orientamenti, nuovi sistemi, nuova struttura, nuovo stile»[70].

È evidente come il processo di fascistizzazione si sia impregnato anche nell'attività magistrale del maestro Lucaroni. Nei suoi scritti iniziano a comparire

[68] Su questa pratica, in particolare, si veda quanto già osservato da Davide Montino in: D. Montino, *La pratica pedagogica del "Diario della vita di scuola". Dalla possibilità di una scrittura intima alla necessità di una scrittura disciplinata (1923-1943)*, in A. Castillo Gómez, V. Sierra Blas (edd.), *Mis primeros pasos. Alfabetización, escuela y usos cotidianos de la escritura (siglos XIX y XX)*, Gijón, Trea, 2008, pp. 373-390.

[69] L. Volpicelli, *Commento alla Carta della Scuola*, «Quaderni dell'Istituto Nazionale di cultura fascista», serie decima, n. 1, 1940, pp. 51-52, Supplemento di «Civiltà Fascista», n. 3, marzo 1940.

[70] Lucaroni, *L'insegnamento della lingua nelle scuole elementari*, relazione, cit., p. 23.

riferimenti al Duce e al fascismo e le cronache di vita scolastica e osservazioni sugli alunni contenute nei registri di classe, anno dopo anno, appaiono sempre più colme di riferimenti politici, anche se nel suo modo di fare scuola non si discosta mai da quei principi che lo animavano negli anni Venti.

Sono anche i registri di classe ad aiutarci nella ricostruzione di una parte importante della biografia professionale di Lucaroni, un maestro che «dell'opera educativa ha fatto il crogiolo di tutta la vita» e che ha sempre dimostrato impegno e dedizione nel costruire un percorso di miglioramento per sé e per gli alunni.

A partire dalla fine degli anni Venti, lo spazio dedicato alla cronaca di vita scolastica e osservazioni degli alunni riporta principalmente – e in misura sempre maggiore con il passare degli anni – tutte le cerimonie e ricorrenze fasciste.

Nelle colonne dedicate alla cronaca sono contenuti commenti e giudizi sulle classi, le critiche, di cui già si è parlato, nei confronti del testo unico di Stato, ma anche di grembiuli e classi miste. Queste colonne riflettono la realtà dell'epoca, quella di un centro rurale in cui a scuola si registrano numerose assenze dovute ai lavori nei campi, in particolare nel periodo tra la fine dell'estate e l'inizio dell'autunno, stagione di vendemmia e raccolta delle olive.

Il tempo della scuola è scandito dalle ricorrenze fasciste, come l'annuale della Marcia su Roma, le cerimonie commemorative alle quali partecipano Balilla e Piccole Italiane in divisa, la fondazione dei Fasci di Combattimento, la fondazione dell'Opera Nazionale Balilla e molte altre. La cronaca di vita scolastica è ricca di tutte queste manifestazioni, così come previsto dalla premessa dei programmi che prevedevano l'importanza della «partecipazione consapevole alle celebrazioni più suggestive della Nazione e la viva conversazione sulle opere del Regime Fascista»[71].

Nel registro di classe dell'anno scolastico 1928/29 Lucaroni, il giorno successivo all'anniversario della Marcia su Roma in cui «Balilla, Piccole Italiane, Scolaresche, Associazioni tutte e gran concorso di popolo hanno reso austera e solenne la cerimonia»[72], riporta che gli alunni ne hanno scritto sul diario, dopo averne parlato insieme al maestro, e che ciò era stato eseguito per ordine superiore. Quasi seccato, Lucaroni commenta: «Se ne sarebbe parlato ugualmente, non v'è da porlo in dubbio!», così come il 5 novembre riporta che si è parlato, come da disposizioni, della Vittoria d'Italia e gli alunni ne hanno scritto sul diario[73].

Agli ordini superiori Lucaroni fa riferimento anche nella cronaca di settembre 1928, esprimendo un certo malessere nei confronti di occupazioni

[71] «Bollettino Ufficiale del Ministero dell'Educazione Nazionale», 1934, pp. 2343-2369 (citato in Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, cit., p. 344).

[72] Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 29 ottobre 1928, in ASICM, busta «Mogliano Registri classe 1928-29», Registro di classe dell'anno scolastico 1928/29.

[73] Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 5 novembre 1928, in *ibid*.

extra-scolastiche, che potrebbero riferirsi all'incarico che ricopre in quegli anni di presidente del comitato locale dell'Opera Nazionale Balilla:

> A mio riguardo debbo confessare, però, che soverchie occupazioni extra-scolastiche mi rubano un tempo prezioso sia come preparazione che come necessario riposo – e ciò mi preoccupa seriamente. È male che le autorità politiche occupino soverchiamente i maestri in cariche e lavori che li possano distogliere o distrarre dalla loro fatica! La disciplina me lo impone e obbedisco: ma sarei ben più lieto se potessi interamente e solamente occuparmi di scuola. Voglio augurarmi di esser presto liberato da un soverchio peso[74].

Si intensifica la cronaca di carattere politico a partire dalla metà degli anni Trenta. Nell'anno scolastico 1935/36 Lucaroni fa riferimento alla raccolta del ferro, riportando nel registro che le scolaresche ne hanno preso parte e che cercano ferro per la Patria[75], mentre il 3 dicembre 1935 inizia una ricca cronaca dedicata alla campagna d'Africa[76]. Il 4 gennaio 1936, per esempio, riporta che «le scolaresche seguono con visibile interesse le fasi e gli sviluppi delle operazioni in Africa Orientale e prendono parte alle reazioni contro le sanzioni»[77], mentre il 18 febbraio parla del «giubilo dell'Italia per la grande vittoria di Amba Aradam» che «ha la sua immancabile eco nella scuola»[78].

Tra le colonne dei registri di Lucaroni emerge l'immagine di una scuola al servizio della propaganda ideologica del regime; per esempio, il 9 maggio 1936 Lucaroni fa riferimento al cuore di ogni italiano che «esulta di orgoglio e di soddisfazione» perché «torna l'impero sui colli fatali di Roma»[79] e, pochi mesi dopo, il 2 ottobre, in occasione dell'Annuale della grande adunata fascista descrive alunni che vibrano di entusiasmo, in quanto

> Il Duce è per i piccoli e per i grandi, l'onnipotente, l'onnipresente. L'amore per Lui è capace di compiere qualunque miracolo. Bene. Gli Italiani sono veramente fusi in unico blocco, compresi questi fanciulli che commuovono con i loro scatti d'entusiasmo per cose così lontane dalla loro valutazione![80]

Lucaroni parla di una «scuola mai assente», quando si tratta del Duce[81] ed è lui stesso a scrivere, il 28 ottobre 1936, che la scuola vive di queste date per

74 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del mese di settembre 1928, in *ibid.*

75 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del mese di ottobre 1935, in ASICM, busta «Mogliano Registri classe 1935-36», Registro di classe dell'anno scolastico 1935/36.

76 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 3 dicembre 1935, in *ibid.*

77 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 4 gennaio 1936, in *ibid.*

78 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 18 febbraio 1936, in *ibid.*

79 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 9 maggio 1936, in *ibid.*

80 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 2 ottobre 1936, in ASICM, busta «Mogliano Registri classe 1936-37», Registro di classe dell'anno scolastico 1936/37.

81 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 24 ottobre 1936, in *ibid.*

celebrare il fascismo, sia attraverso appassionate parate del maestro, sia con la partecipazione alle cerimonie locali[82].

Negli anni successivi i giornali della classe risultano meno ricchi e completi. Dal 1940 al 1942, infatti, Lucaroni è impegnato come direttore didattico del circolo di Corridonia e riprende servizio nella scuola di Mogliano nell'anno scolastico 1942/43 manifestando nella cronaca di vita scolastica di inizio anno il suo entusiasmo nel riprendere l'attività magistrale dopo «il mortificante lavoro di ufficio»[83].

L'anno scolastico successivo il giornale di classe si presenta con diverse pagine tagliate nelle parti precedenti e successive la sezione «Svolgimento del programma didattico per ogni mese». Il programma, riportato in una serie di fogli conservati all'interno del registro, è quello emanato dal Ministro dell'Educazione della Repubblica di Salò Carlo Alberto Biggini, alleggerito nei contenuti e privo di una esplicita connotazione fascista[84].

Si chiude con questo registro di classe una drammatica fase della storia che ha visto la scuola coinvolta in prima linea, ma per Lucaroni sta per aprirsene un'altra, che lo allontanerà temporaneamente da quell'istituzione per cui aveva speso una vita intera.

2. *Lucaroni vittima del processo di epurazione nelle scuole*

Nell'anno scolastico 1944/45 il registro del maestro Lucaroni non contiene indicazioni relative al programma e alle cronache di vita scolastica. Il motivo di tale mancanza potrebbe essere legato al procedimento che la Commissione Provinciale di Epurazione avvia nei suoi confronti. Infatti il maestro ricoprì diversi ruoli all'interno delle organizzazioni fasciste locali[85], i quali sono indicati nel registro dell'anagrafe magistrale del Comune di Mogliano dell'Associazione Fascista della Scuola (Sezione elementare)[86].

82 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 28 ottobre 1936, in *ibid*.

83 Cronaca ed osservazioni dell'insegnante sulla vita della scuola del 3 novembre 1942, in ASICM, busta «Mogliano Registri classe 1942-43», Registro di classe dell'anno scolastico 1942/43.

84 Cfr. D. Gabusi, *I bambini di Salò. Il ministro Biggini e la scuola elementare della Rsi (1943-1945)*, Brescia, Scholé, 2018.

85 Sul tema dell'epurazione degli insegnanti, si veda: F. Targhetta, *Tra selva normativa e schedatura di massa: i procedimenti di epurazione degli insegnanti di scuola secondaria*, «Rivista di storia dell'educazione», n. 1, 2018, pp. 209-225; più in generale, sul processo di epurazione, si vedano: R. Canosa, *Storia dell'epurazione in Italia. Le sanzioni contro il fascismo 1943-1948*, Milano, Baldini & Castoldi, 1999; H. Woller, *I conti con il fascismo. L'epurazione in Italia 1945-1948*, Bologna, Il Mulino, 1997.

86 Registro anagrafe magistrale del Comune di Mogliano dell'Associazione Fascista della scuola – sezione elementare in ASICM, busta «Mogliano Registri classe 1943-44».

All'interno si trovano le schede dei maestri elementari, tra cui anche quella della moglie Ilda Seri-Molini e dell'amico e collega Nicola Ripamonti. Lucaroni risulta iscritto, senza interruzione, alla Corporazione Associazione Nazionale Insegnanti Fascisti, all'Associazione Fascista della Scuola dal 1° ottobre 1925 (sezione di Mogliano) e anche al Partito Nazionale Fascista dal 1° maggio 1923. È stato anche membro della Milizia Volontaria per la Sicurezza Nazionale con il grado di Capo Manipolo.

Nel registro sono indicate anche le benemerenze professionali e civili ricevute, come il conferimento del titolo di Cavaliere della Corona d'Italia, assegnatogli nel 1931, della medaglia di bronzo per i benemeriti dell'Educazione Nazionale (1927) e della medaglia di bronzo per i benemeriti dell'Opera Nazionale Balilla (1931).

Tra i suoi incarichi, risultano anche quello di membro direttorio del Fascio di Mogliano nel 1924 e nel 1929 e di commissario straordinario del Fascio di Mogliano nei mesi di giugno, luglio e agosto 1929. Inoltre, il maestro nel 1924 crea il Gruppo autonomo Balilla e ricopre il ruolo di primo presidente dell'Opera Nazionale Balilla dal 1928 al 1930, incarico che gli viene assegnato nuovamente a partire dal 1934, per divenire poi vicecomandante della Gioventù Italiana del Littorio nel 1937.

Ruoli e incarichi che ricopre per oltre dieci anni e che gli costano, il 14 settembre 1944, il provvedimento di sospensione per ragioni di sicurezza per il titolo 'sciarpa littorio' da parte del Provveditore agli Studi Giuseppe Borgiani di Macerata[87].

Il maestro Lucaroni risponde al provvedimento il 21 settembre 1944[88], chiedendo di essere convocato in udienza e invoca la revoca del provvedimento da parte della Commissione di Appello per continuare a Mogliano «per il brevissimo periodo che mi divide dalla pensione, il mio lavoro scolastico da cui solo traggo i mezzi dell'esistenza» e precisando che

> pur essendo fornito di titolo superiore (Diploma di direttore didattico) ed avendo delle riconosciute benemerenze di carattere professionale, non ho tratto dal cessato regime alcun vantaggio di carriera essendo rimasto sempre e solamente maestro, nè alcun vantaggio economico essendo tuttora nullatenente![89]

Nella lettera ripercorre tutte le vicende che lo vedono implicato nelle attività delle organizzazioni fasciste locali, sottolineando che si iscrisse al fascio nel 1923 «per pressione di autorevoli amici» e che nel 1924 tentò di dare le dimissioni, evidenziando che tale sua azione pesò su di lui per lunghi

[87] Provvedimento del Provveditore agli Studi di Macerata, in CESCO, Fondo «Giovanni Lucaroni», serie «Titoli e documenti», c. 35.

[88] Lettera di Lucaroni, in CESCO, Fondo «Giovanni Lucaroni», serie «Titoli e documenti», c. 37.

[89] *Ibid.*

anni. Spiega, inoltre, che una volta sciolto il fascio locale, non fu riammesso all'atto della sua ricostruzione, ma iscritto più tardi d'ufficio senza averne fatto richiesta. La lettera continua specificando che

> Nel 1930, essendo l'unico maestro del comune che avesse prestato servizio militare […] e che avesse ancora qualche capacità fisica, mi fu affidato il compito di curare i balilla (più tardi G.I.L.) e mi fu dato il grado di Capomanipolo (nell'O.N.B.), servizio che fu poi reso obbligatorio per i maestri. Con tale grado e sempre nelle organizzazioni giovanili rimasi fino al 1940 e per tale servizio mi venne concessa la sciarpa littorio (senza l'indennità).

Lucaroni ripercorre quegli anni e arriva al 1940, anno in cui assume la carica di podestà, dicendo di essere stato minacciato «da parte del Prefetto dell'epoca di essere espulso dal partito e dalla scuola se non avessi firmato il decreto di nomina provocato senza essere stato interpellato e senza mio preventivo benestare». Il maestro marchigiano afferma che anche il nullaosta del Ministero dell'Educazione Nazionale fu richiesto ed ottenuto a sua insaputa.

Lucaroni, inoltre, sostiene di aver interrotto ogni rapporto con il fascismo dopo il luglio del 1943 in quanto non intendeva servire il governo d'occupazione, ricevendo anche minaccia di sanzioni da parte dei Carabinieri. Nella sua dichiarazione indica di aver poi abbandonato l'incarico di podestà, per il quale aveva ripetutamente presentato le dimissioni senza ricevere alcun riscontro.

Lucaroni fa anche riferimento alle numerose cariche amministrative che aveva ricoperto, come quella di Giudice Conciliatore, incarico lasciato nel maggio 1944 «poiché per esercitarla ancora occorreva prestar giuramento al governo della Repubblica», ma ci tiene a sottolineare che nelle numerose cariche di carattere amministrativo che gli sono state affidate, sia prima che durante il cessato regime, ha sempre adottato

> il più scrupoloso senso di onestà, di obiettività e di assoluto disinteresse fino al punto di non avere mai percepito neppure un soldo all'infuori dello stipendio di maestro, né di aver accettato compensi o regali di qualsivoglia natura.

Inoltre, per sottolineare la sua onestà e obiettività, evidenzia che «durante il periodo di occupazione tedesca nessun ordine di precettazione, requisizione o arruolamento è stato eseguito a Mogliano fino a che io sono rimasto al comune come podestà» e aggiunge:

> Gli internati politici residenti a Mogliano ed i prigionieri alleati sbandati non hanno mai trovato, in me podestà, il benché minimo ostacolo, ma umana comprensione e quelle agevolazioni che erano nelle mie possibilità.

A dimostrazione di ciò, nella lettera chiede che siano interrogati due internati[90] e continua sottolineando che «la violenza e l'intemperanza non

[90] Lucaroni fa riferimento a Leslie Lapin Peregrini, ebreo di nazionalità inglese, e a Giacomo

fanno parte del mio carattere e che (almeno fino ad ora) neanche il più lieve appunto mi è stato mosso né dai dirigenti del movimento patriottico, né dal Comitato di liberazione, né dai dirigenti dei partiti politici riorganizzati».

Nei giorni seguenti sono diverse le persone che difendono Lucaroni attraverso una serie di lettere. Il cancelliere Caraceni conferma che Lucaroni alla presentazione del giuramento di fedeltà alla Repubblica fascista dichiarò esplicitamente che non avrebbe prestato nessun giuramento e che cessò di tenere ogni ulteriore udienza come Giudice Conciliatore[91]. I maestri Marco Tamburrini, Nicola Ripamonti, Vittorio Mastrocola e le maestre Maria Marcucci, Teresa Miliozzi Garulli, Teresa Minnucci Mollaioli, Carolina Capriotti Graziosi, Vera Garulli, Giuseppina Tacci e Maria Vincenza Giuli Palmieri lo descrivono come un maestro che, da oltre 30 anni, cura, con entusiasmo e disinteresse, l'incremento delle scuole, «aumentate di numero, migliorate nell'edilizia, organizzate in ogni attività». Lo presentano come una persona sempre pronta ad aiutare l'altro per un consiglio o assistenza nelle molteplici necessità di carattere professionale, evidenziando «l'opera sua competente, seria, onesta e leale». I colleghi sottolineano che

> Durante il periodo turbinoso delle riforme scolastiche fasciste usò una saggia moderazione ed un giusto equilibrio, dimostrandosi anche in molti casi completamente ostile all'applicazione di esse.

I maestri aggiungono che nel 1944 Lucaroni non curò il tesseramento degli alunni all'Opera Nazionale Balilla, riorganizzata dalla dittatura repubblichina ed evidenziano che «non ha mai dato prova di settarietà o di intemperanza fascista»[92]. A confermarlo anche le voci della Superiore suor Comi del ricovero di Mogliano[93], suor Adolfa Bozzi[94], Superiore dell'Ospedale e Orfanotrofio Femminile, Michele Minnucci, presidente dell'asilo «Adriano Adriani» di Mogliano[95] e Luigi Giachini, parroco della chiesa di Santa Maria di Mogliano[96]. È lo stesso sindaco del Comune di Mogliano, Carlo Bordoni, a confermare

Perhavec, di nazionalità jugoslava, entrambi sottoposti a misura di 'internamento libero' a Mogliano, scrivendo che i due potranno fornire anche particolari che lui non ritiene opportuno comunicare per iscritto. Sul tema dell'internamento in territorio marchigiano, più in generale, si vedano: R. Cruciani (ed.), *E vennero… 50 anni di libertà, 1943-1993: campi di concentramento, prigionieri di guerra, internamento libero nella Marche 1940-1945*, Macerata, Cooperativa Artivisive, 1993; G. Morgese, D. Duca, *Una regione e i suoi "campi". Tra concentramento, internamento, liberazione, deportazione e supplizio (1940-1944)*, Venezia, Ikona, 2014.

91 Lettera del cancelliere Caraceni, in CESCO, Fondo «Giovanni Lucaroni», serie «Titoli e documenti», busta «Lettera di Ercoli Ercole del gruppo partigiano 'Decio Filipponi' e sette allegati», c. 4.

92 Lettera dei maestri e delle maestre del comune di Mogliano, in *ibid.*, c. 5.

93 Lettera di suor Comi, in *ibid.*, c. 6.

94 Lettera di suor Adolfa Bozzi, in *ibid.*, c. 7.

95 Lettera di Michele Minnucci, in *ibid.*, c. 8.

96 Lettera di Luigi Giachini, in *ibid.*, c. 3

che non risulta aver commesso atti di intemperanza politica[97]. In sua difesa interviene anche Ercole Ercoli, del gruppo partigiano «Decio Filipponi», in una lettera del 1° ottobre[98]

> Prima dell'8 settembre 1943 egli è stato sempre cittadino integerrimo preoccupandosi soltanto della educazione e della istruzione della gioventù del paese come insegnante, e come podestà ha badato continuamente a bene amministrare il comune, ed ogni cittadino ha sempre trovato in lui sostegno, consiglio ed aiuto. Politicamente è stato fascista come tutti gli altri e mai fanatico e non ha mai commesso atti di settarietà e intemperanza politica. Dopo l'8 settembre '43 egli si è dimostrato subito ostile al governo della Repubblica nazi-fascista dandone subito prova nel rifiuto della carica di podestà. Il suo comportamento in pubblico e la sua condotta in genere dall'8 settembre in poi è stata ostile al fascio ed assenteistica.

Lucaroni, il 6 ottobre, si rivolge al Comitato comunale di Liberazione Nazionale affinché gli forniscano un giudizio sulla sua condotta morale, civile, politica e professionale da produrre alla Commissione d'appello per l'epurazione[99]. Il 7 dicembre 1944 Lucaroni riceve un nuovo provvedimento dal Provveditorato agli Studi di Macerata in cui viene comunicata la riammissione in servizio con la punizione della censura, decisione del Commissario Regionale Alleato per l'Educazione, in seguito al giudizio della Commissione provinciale d'appello per l'epurazione della scuola.

Le indagini sul conto di Lucaroni continuano nei mesi successivi. Virginio Borioni, della delegazione provinciale dell'Alto Commissariato Aggiunto per l'Epurazione, il 19 ottobre 1945, indirizza al Comando dei Carabinieri di Caldarola e Mogliano e al Comitato Comunale di Liberazione Nazionale di Caldarola e Mogliano una lettera[100] nella quale richiede urgentemente un rapporto informativo sul maestro. Il 25 ottobre il Comitato Comunale di Liberazione di Mogliano scrive al Commissariato per l'Epurazione di Macerata[101] confermando che Lucaroni non abbia mai tenuto alcuna condotta immorale.

Il procedimento a carico di Lucaroni si chiude definitivamente dopo due anni, quando il 26 gennaio 1946, il provvedimento della Commissione Provinciale di Epurazione viene revocato[102].

97 Lettera di Carlo Bordoni, in *ibid*., c. 2.

98 Lettera di Ercole Ercoli, in *ibid*., c. 1.

99 Lettera di Lucaroni al Comitato comunale di Liberazione Nazionale, in CESCO, Fondo «Giovanni Lucaroni», serie «Titoli e documenti», c. 39.

100 Lettera di Virginio Bordoni al Comando dei Carabinieri, al CLN di Caldarola e Mogliano, in Archivio di Stato di Macerata, fondo CLN, busta 18, fascicolo 159 denominato «Assegnazioni varie per il comitato», Informazioni.

101 Lettera del CLN di Mogliano al Commissariato per l'Epurazione di Macerata, in *ibid*.

102 Provvedimento del Provveditore agli Studi di Macerata A. Tornese, in CESCO, Fondo «Giovanni Lucaroni», serie «Titoli e documenti», c. 34; ASICM, busta «Fascicoli insegnanti a riposo tra il 1945 e il 1958», fascicolo «Giovanni Lucaroni collocato a riposo 1-10-1956».

Questa vicenda dimostra come per tanti insegnanti l'adesione al fascismo sia stata una «scelta più formale piuttosto che dettata da una completa accettazione della ideologia fascista»[103]. La genuinità dei consensi, d'altronde, è stata messa in discussione anche «dalla constatazione che alla fine del ventennio molti maestri si premurano di distruggere atti importanti, quali cronache e le relazioni finali»[104], anche se queste azioni potrebbero essere legate al timore di ritorsioni[105]. Anche alcuni registri del maestro Lucaroni appaiono con pagine tagliate, come quelli degli anni scolastici 1929/30, 1932/33, 1937/38, 1938/39 e 1943/44.

3. *L'influsso dell'attivismo pedagogico sulle pratiche didattiche del maestro Lucaroni (1945-1956)*

All'indomani della caduta del fascismo, alla scuola viene attribuito il compito di infondere i nuovi principi democratici e una nuova idea di cittadinanza[106] attraverso i libri e i programmi scolastici, i quali necessitano di un profondo cambiamento. La prima revisione in linea politica si deve alla Sottocommissione per l'Educazione dell'Allied Military Government, presieduta dal pedagogista statunitense Carleton Washburne: non solo stabilì i criteri per la revisione dei testi scolastici per le scuole di ogni ordine e grado ma mise mano ai programmi didattici per la scuola materna ed elementare e per l'istituto magistrale[107].

Il lavoro della Sottocommissione si basa sulla «necessità urgente di rieducare, politicamente e socialmente, una nazione che, dopo venti anni di tirannide, non sapeva più cosa fossero democrazie e collaborazione internazionale»[108]; i nuovi programmi del 1945 – ispirati ai principi della pedagogia attivistica di matrice deweyana[109] – pongono al centro dell'opera formativa l'educazione alla democrazia e introducono il principio dell'autogoverno.

103 Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, cit., p. 104.
104 *Ibid.*
105 *Ibid.*
106 Cfr. Ascenzi, *Metamorfosi della cittadinanza*, cit., pp. 309-310.
107 Sull'attività della Sottocommissione per l'Educazione dell'*Allied Military Government* (AMG) si vedano: C. Washburne, *La riorganizzazione dell'istruzione in Italia*, «Scuola e città», n. 6-7, 1970, pp. 273-277; S.F. Withe, *Progressive Renaissance: America and the Reconstruction of Italian Education 1943-1962*, New York-London, Garland, 1991.
108 Cfr. R. Sani, *La scuola e l'educazione alla democrazia negli anni del secondo dopoguerra*, in M. Corsi, R. Sani, *L'educazione alla democrazia tra passato e presente*, Milano, Vita e Pensiero, 2004, pp. 43-62.
109 Cfr. A. Visalberghi, *L'influenza del pensiero pedagogico americano*, in G. Tassinari (ed.), *La pedagogia italiana del secondo dopoguerra*, Firenze, Le Monnier, 1987, pp. 29-37; G. Spadafora, *Interpretazioni pedagogiche deweyane in America e in Italia*, Catania, Università degli Studi di Catania, 1997.

Nelle avvertenze dedicate all'insegnamento dell'educazione morale, civile e fisica è riportato il fondamentale compito della scuola, quello di «svegliare nei fanciulli il senso individuale della responsabilità e di destare in essi il bisogno dell'ordine, del rispetto, dell'aiuto reciproco: in breve, delle virtù civili, sociali e morali». L'insegnante, invece, è tenuto a «promuovere la spontanea e diretta collaborazione degli scolari nel governo della classe»[110].

I registri di classe e le relazioni del maestro Lucaroni ci restituiscono un'immagine ben definita dell'applicazione di tali programmi in classe. Affinché il principio dell'autogoverno possa radicarsi nelle giovani generazioni il programma scolastico prevede, per la prima, seconda e terza classe, esercizi, incarichi di fiducia e referendum, mentre per la quarta e quinta classe gli scolari sono chiamati a dare giudizi su casi della vita morale e sociale ed è previsto l'esercizio del diritto di referendum e del diritto di iniziativa in casi reali della vita scolastica. Inoltre, il programma dispone anche esercizi di autogoverno attraverso la costituzione di commissioni per la pulizia, la disciplina, la biblioteca, l'organizzazione sportiva e di cooperative scolastiche[111].

Lucaroni, come ha fatto negli anni precedenti, segue fedelmente il programma e sperimenta diverse attività al fine di infondere i nuovi principi. All'inizio dell'anno scolastico 1945/46, sotto la voce «Educazione morale, civica e fisica», indica la nomina di commissioni per alunni, quella di disciplina e di merito. Tra i temi trattati in classe, anche quello del voto, della giustizia e della serietà di giudizio e della necessità dell'ordine nella disciplina scolastica.

I compiti di queste commissioni sono ben illustrati in uno scritto di Lucaroni[112] datato 4 aprile 1946. La Commissione di disciplina, composta da tre membri nominati per scrutinio segreto, ha il compito di curare la disciplina della scuola e dei compagni, sorvegliare le entrate e le uscite, regolare il comportamento durante le lezioni, tener nota dei ritardatari e assegnare mensilmente un voto complessivo di condotta, mentre quella di merito, composta sempre da tre membri nominati per scrutinio segreto, ha l'incarico di classificare gli alunni per ordine di merito e assegnare i voti nelle varie interrogazioni e nelle gare mensili. I membri di questa commissione devono dare esempio di ordine, di disciplina e di studio: hanno l'obbligo morale di saper sempre rispondere alle domande rivolte dal maestro o dai compagni sui vari argomenti di studio. Tra gli incarichi, anche quello di proporre compiti, poesie, letture ed altri argomenti di studio.

Nel mese di gennaio 1946 Lucaroni cerca di rendere ancora più concreto il principio dell'autogoverno e della libera iniziativa e propone alla classe la

110 Cfr. Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, cit., p. 375.

111 *Ibid.*, pp. 377-379.

112 G. Lucaroni, *Il nuovo concetto dell'autogoverno al quale deve ispirarsi l'ordinamento disciplinare e didattico*, relazione del 4 aprile 1946, in CESCO, Fondo «Giovanni Lucaroni», «Pubblicazioni e scritti vari», c. 6.

redazione di un giornalino, ma con scarsi risultati perché la classe non reagisce e mostra scarso interesse[113].

La redazione del giornale, ad esempio, ha il compito di raccogliere e ordinare tutto il materiale che viene offerto dai compagni e dal maestro, come leggende, novelle, poesie, disegni, proverbi, indovinelli e curiosità, e di redigere il copione del periodico[114]. Per gli alunni la compilazione del giornale risulta difficoltosa, ma per Lucaroni la 'responsabilità' è da attribuire anche al contesto in cui vivono:

> Qui siamo in ambiente agricolo; nelle case non vi sono, si può dire, che i libri dei fanciulli e qualche inservibile giornale politico; manca a tutti la possibilità di ricerca, di consultazione, di aiuto, di suggerimento e di guida.

Gli alunni sono responsabilizzati ulteriormente quando Lucaroni, nel mese di marzo, istituisce una commissione di assistenza per la raccolta del fondo di solidarietà, che ha il mandato di raccogliere le offerte dei compagni e di estranei per un fondo permanente di beneficenza[115].

Nonostante il grande impegno del maestro, a fine anno i risultati sono insoddisfacenti. Le cause, secondo Lucaroni, sono diverse: dalla mancanza di libri e carte geografiche all'ozio e all'incapacità degli alunni, fino ai genitori che considerano le tante attività proposte come una perdita di tempo. Il maestro moglianese ritiene che le famiglie non sappiano adattarsi al senso di modernità della scuola e non ne comprendano lo spirito, ma desiderino solo una scuola dove si insegni a leggere, a scrivere e a far di conto[116], in quanto ancora fortemente legati all'«immanente tradizionalismo della scuola passiva»[117].

Secondo Lucaroni l'autogoverno chiede al maestro di «trarre tutto o possibilmente tutto dall'allievo; condurre il fanciullo a poter imparare da sé» in modo che possa diventare cosciente e responsabile delle proprie azioni. Egli sottolinea anche che tale principio dovrà condurre alla costruzione, in regime di libertà, della coscienza e dell'anima delle nuove generazioni.

Secondo Lucaroni tale principio non è stato adottato fino a quel momento in Italia per una serie di motivi, a partire da quello economico, «per la nostra attuale tragica miseria, con la nostra edilizia, con la quasi comica recente esperienza delle nostre scuole del lavoro, con l'affollamento delle nostre classi». Tra le ragioni è necessario considerare anche l'assoluta mancanza di spirito democratico ma anche quelle che il maestro chiama 'ragioni di famiglia' e,

113 Programma del mese di gennaio dell'anno scolastico 1945/46, in ASICM, busta «Mogliano Registri classe 1945-46 e 1946-47», Registro di classe dell'anno scolastico 1945/46.

114 Lucaroni, *Il nuovo concetto dell'autogoverno al quale deve ispirarsi l'ordinamento disciplinare e didattico*, cit.

115 *Ibid.*

116 Programma del mese di aprile dell'anno scolastico 1945/46, in ASICM, busta «Mogliano Registri classe 1945-46 e 1946-47», Registro di classe dell'anno scolastico 1945/46.

117 *Ibid.*

quindi, l'inadeguata preparazione culturale, la pigrizia mentale, la brama di evasione per necessità economiche, la passiva recezione di ordini d'ogni genere, la mancanza di una propria definita personalità e di una chiara concezione dei problemi sociali, storici e didattici. Per tutti questi motivi, la famiglia magistrale è diventata, per quanto riguarda i maestri più maturi, una sottospecie umana, disorientata, rassegnata ed abulica mentre i più giovani sono «una massa scanzonata di menefreghisti in attesa dell'irrisorio 27!». Infine, tra i motivi annovera anche

> il totalitario sciopero bianco degli alunni, provocato dalle più avventate ed improvvisate sperimentazioni, dall'enciclopedismo che imperversava e continua ad imperversare purtroppo nei bruttissimi libri di testo, cambiati e ricambiati ad ogni vento di fronda[118].

Lucaroni mette in pratica il principio dell'autogoverno attraverso le elezioni di squadre – che hanno scelto i nomi di «Garibaldina», «Francescana» e «Folgore» – che, a loro volta, scelgono i membri delle commissioni a scrutinio segreto. Le squadre hanno diversi incarichi, come quello di ritirare le pagelle, le somme occorrenti per ogni necessità, organizzare la biblioteca e il suo funzionamento[119]. La costituzione delle squadre, secondo il maestro, è capace di infondere un nuovo spirito di attività, collaborazione e responsabilità, collettiva e personale[120].

Dall'analisi dei registri emerge l'entusiasmo di Lucaroni nello sperimentare pratiche che siano in grado di trasmettere i principi di cooperazione e solidarietà. Nel mese di aprile del 1947, nella cronaca scolastica racconta di aver congegnato una gara permanente di lettura che ha dato buonissimi risultati suscitando interesse e spirito di emulazione, in cui sono sempre gli alunni a giudicarsi tra loro.

Il maestro organizza anche gare per il tema, per il dettato e per il problema, come per le interrogazioni. Negli anni successivi propone nuove iniziative legate al principio dell'autogoverno affidando nuovi incarichi, come quello della commissione di disciplina tenuta a redigere un piccolo regolamento per la ricreazione[121] e con lezioni che chiama «di botta e risposta», ossia delle gare in cui sono gli studenti stessi a porre le domande ai compagni su questioni attinenti al programma ma non solo[122].

118 Lucaroni, *Il nuovo concetto dell'autogoverno al quale deve ispirarsi l'ordinamento disciplinare e didattico*, cit.

119 Programma scolastico del mese di marzo dell'anno scolastico 1946/47, in ASICM, busta «Mogliano Registri classe 1945-46 e 1946-47», cit.

120 Lucaroni, *Il nuovo concetto dell'autogoverno al quale deve ispirarsi l'ordinamento disciplinare e didattico*, relazione del mese di ottobre 1946, in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti», c. 8.

121 Programma scolastico del mese di marzo dell'anno scolastico 1947/48, in ASICM, busta «Mogliano Registri classe 1947-48 e 1948-49», Registro di classe dell'anno scolastico 1947/48.

122 Programma scolastico del mese di febbraio dell'anno scolastico 1948/49, in ASICM, busta «Mogliano Registri classe 1947-48 e 1948-49», Registro di classe dell'anno scolastico 1948/49.

Tra le commissioni istituite da Lucaroni c'è anche quella dedicata alla pulizia, come riporta nel registro di classe dell'anno scolastico 1950/51, la quale è incaricata di occuparsi della pulizia e dell'ordine dell'aula ma anche dell'organizzazione dei giochi. Negli anni successivi Lucaroni continua a proporre esercizi di autogoverno, adattandoli all'età dei bambini e cercando sempre di incentivare l'affiatamento tra compagni e di infondere il senso di cooperativismo.

A tre anni dal pensionamento, Lucaroni viene chiamato a tenere una relazione in occasione di un convegno didattico a Corridonia, in provincia di Macerata, il 14 marzo 1953. Il maestro marchigiano affronta il tema *Problemi d'oggi. Programmi e metodi*[123] con tono polemico e provocatorio.

Nel fondo «Giovanni Lucaroni» ci sono due copie manoscritte di questa relazione, di cui una mancante di alcune pagine che si suppone possa essere stata la brutta copia e in cui è interessante sottolineare che il maestro ha prima scritto, e poi cancellato, «dopo anni di volontario silenzio». In effetti, come è stato dimostrato, Lucaroni – anche se a volte ha manifestato il suo malumore nei confronti di certi aspetti della scuola – ha sempre mantenuto un comportamento pacato, rispettando le regole e gli ordini dei superiori.

Lucaroni riprende la sua critica nei confronti di programmi e metodi che, seppur mutati nel tempo, continuano comunque ad essere infarciti della stessa quantità di nozioni mnemoniche da ripetere a richiesta. Sottolinea anche che la scuola è ancora piena di migliaia di pagine che pesano sulle tasche dei genitori e sulle cartelle degli alunni, così come la scuola è ancora quella che pensa alle osservazioni dei superiori, al traguardo degli esami, alle «forche caudine» dell'ammissione alle medie. Tutto ciò non va soppresso, ma non è ancora la scuola, secondo Lucaroni, perché la scuola è anche – e soprattutto – l'opera degli insegnanti, «quella che crea, che redime ed esalta, quella che può veramente forgiare i destini di un popolo».

L'educazione, per Lucaroni, è un atto altamente spirituale e umano, e invece oggi la scuola «ha la pretesa di strafare e quindi insegna poco e male e non educa». Il maestro marchigiano ironizza sulla quantità di metodi che entrano all'interno della scuola, di cui vi è «una fioritura così rigogliosa che si è seriamente imbarazzati anche a farne solamente un elenco», perché ce ne sono «di vecchi e di nuovi, di buoni e di fallaci, di mediocri e di infallibili, di moda e di sorpassati». Cita il metodo globale, quello montessoriano, ma anche la scuola attiva e quella del lavoro e Ferrière, Dewey, Decroly, Tobler e Petersen, senza dimenticare i programmi del 1945, basati sul principio dell'autogoverno, che lui chiama «Giove, l'olimpico dio onnipossente e fascinatore». Secondo Lucaroni, il metodo – qualunque esso sia – non ha alcun valore se non sia diventato «essenzialmente e sacrosantamente il mio metodo, il nostro metodo,

[123] Lucaroni, *Problemi d'oggi. Programmi e metodi*, relazione del 14 marzo 1953, in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti», c. 9.

il metodo di ciascuno di noi», attraverso una personale rielaborazione e quindi impratichendosi e sperimentandolo, giorno dopo giorno, nella pratica dell'insegnamento.

Insomma, al centro dell'opera educativa c'è il maestro, colui che, per Lucaroni, deve tenere a mente due sole parole: *educare necesse*. La scuola è a servizio dell'alunno e non viceversa: essa deve piegarsi alle sue necessità, alle sue possibilità e alle sue capacità, in quanto non vige un obbligo bensì un diritto scolastico.

Con questa relazione praticamente si chiude la carriera magistrale di Lucaroni, che è riuscito a difendere la sua idea di maestro, senza che programmi, metodi e regimi riuscissero a scalfirla. Si chiudono così oltre quaranta anni di insegnamento affrontati con fatica, amore, responsabilità e con una vera e propria fede educativa.

Conclusioni

La ricostruzione della biografia intellettuale e professionale di Giovanni Lucaroni ha permesso di ripercorrere la storia della scuola analizzando in che modo il maestro di un piccolo paese dell'entroterra maceratese abbia affrontato i mutamenti del sistema scolastico in diversi periodi storici, a partire dall'inizio del Ventennio fascista fino all'avvento della democrazia.

La ricerca si è svolta in due momenti. Nel primo contributo[124], relativo all'attività magistrale svolta da Lucaroni negli anni Venti, il maestro moglianese accoglie con entusiasmo i programmi redatti da Lombardo Radice, tanto da diffondere i principi propugnati in essi attraverso numerose pubblicazioni. È evidente quanto la pedagogia lombardiana abbia influito sulla concezione scolastica e sulla metodologia d'insegnamento del maestro moglianese e quanto abbia continuato ad influenzarlo negli anni successivi, anche quando il processo di fascistizzazione della scuola spazza via i principi cari a Lombardo Radice.

Nel secondo contributo, relativo all'attività magistrale da lui svolta dall'inizio degli anni Trenta fino alla metà degli anni Cinquanta, si delinea – attraverso articoli, relazioni e cronache scolastiche – il ritratto di un maestro che continua ad applicare i principi in cui aveva sempre creduto. Lucaroni, infatti, pur rispettando i programmi governativi e piegandosi al regime fascista, per tutta la sua carriera pone al centro dell'opera educativa il maestro, che – nella sua concezione – non scalfisce mai la spontaneità e la genuinità del bambino e non deve impartire nozioni, di cui sono infarciti i testi che tanto

[124] Cfr. Paciaroni, *La «scuola serena» a Mogliano*, cit.

critica, ma trasmettere il sapere. L'alunno, per Lucaroni, «non è un contenitore da riempire, ma una fiaccola da accendere»[125].

Nonostante i programmi scolastici vengano svuotati dei principi e dallo spirito dell'idealismo lombardiano, il maestro moglianese li interpreta di volta in volta intelligentemente, preservando sempre quei principi attivistici ai quali aveva ormai improntato il proprio metodo d'insegnamento. Nonostante le sostanziali modifiche e i profondi cambiamenti che investono il mondo della scuola, la straordinaria resilienza dimostrata dal maestro moglianese gli consente di continuare a praticare la «scuola attiva» in cui aveva sempre fortemente creduto. È lo stesso Lucaroni a scrivere che bisogna obbedire, ma bisogna anche essere pronti a decidere e a osare[126], continuando a ispirarsi nella propria pratica educativa quotidiana ai principi pedagogici attivistici, pur manifestando esteriormente la propria adesione ai ferrei precetti dell'educazione littoria.

Non a caso, nel momento in cui entrano nelle scuole i programmi compilati dal pedagogista Washburne, ispirati ai principi dell'attivismo pedagogico di John Dewey, il cui pensiero era stato introdotto in Italia molti anni prima proprio da Lombardo Radice[127], il maestro Lucaroni si mostra ben lieto di tornare alle proprie origini pedagogiche, sperimentando nuove forme di educazione attiva e democratica.

125 Questi concetti sono espressi dal maestro in G. Lucaroni, *Lettura ed esercizi di lingua italiana in quinta classe*, in Id., *Per la nuova scuola*, Montegiorgio, Tip. Carlo Zizzini, 1927, p. 42 e nella relazione dal titolo *Problemi d'oggi. Programmi e metodi* che Lucaroni legge in occasione del convegno didattico di Corridonia il 14 marzo 1953 (in CESCO, Fondo «Giovanni Lucaroni», serie «Pubblicazioni e scritti», c. 9).

126 Cfr. Lucaroni, *Standard = Instruction*, cit., p. 18.

127 A questo proposito, si ricorda che nella collana *Scuola e vita. Biblioteca popolare di pedagogia*, diretta da Giuseppe Lombardo Radice, nel 1915 è stato pubblicato J. Dewey, *La scuola e la società*, trad. a cura di G. Di Laghi, Catania, Battiato, 1915.

Sources and Documents | **Fonti e Documenti**

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Entrance examinations in the 1920s: correspondence schools decline the invitation

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ABSTRACT: Can all adults benefit from part-time education? Or should some potential students be told the courses were beyond their ability? In the 1920s, the leaders of U.S. correspondence schools wanted to enroll as many students as possible. In contrast, the head of the major U.S. philanthropy for education questioned that optimism. This article includes two letters setting forth the different views. The exchange is a case study of the longstanding American debate on open access to education.

EET/TEE KEYWORDS: History of education; Adult education; Correspondence schools; History of testing; USA; XXth Century.

Should correspondence schools give aptitude tests before enrolling new students? That was the question discussed in the two letters reprinted in this article. The President of a major philanthropy thought it was a very good idea; the Vice President of the second largest correspondence school in America disagreed. Their exchange is more than a chapter in the history of distance education. The letters give us a vivid example of the endless American debate on open access to education.

In a «Yale Review» article, the head of the Carnegie Corporation, Frederick Keppel, compared full time students to professional soldiers. By the mid-1920s, there were approximately 25,000,000 student-soldiers in classrooms from kindergarten to graduate school. In contrast, around 3,000,000 part-timers, the militia, enlisted in evening classes, correspondence schools, university extension courses, YMCAs, and programs offered by libraries and museums. The size of the militia impressed Keppel – he counted five times as many part-timers as full-time college undergraduates. «All in all, it is certainly safe to say that education

for adults has become one of our major industries»[1]. Yet the officers overseeing the soldiers often ignored the part-time militia. Adult education lacked status, especially for faculty more interested in research than teaching. Endowment funds that underwrote traditional higher education rarely supported the extramural work.

And the hundreds of for-profit vendors of vocational courses tainted the entire enterprise as commercial rather than academic. Keppel wanted adult educators to adopt a major innovation on brick-and-mortar campuses: aptitude tests. He celebrated the «almost uncanny accuracy of the prognosis» yielded by the best tests[2] Keppel had no misgivings about the growing reliance on intelligence and achievement tests. The new examinations helped the U.S. Army screen its recruits in World War 1, enabled elementary schools to group students by ability, and let colleges gauge the talent of their applicants. Whatever the criticisms of standardized tests, Keppel saw significant benefits for adult education. The horrendous dropout rate would fall if more students knew whether or not they could do the work. Schools might not want to turn anyone away, but the «sifting device» could be used by potential students who voluntarily measured their own strengths and weaknesses. Doing so should be as common as taking the initiative to see a doctor for an eye exam. Keppel's recommendation worried William Bethke, the chief educational officer of LaSalle Extension University in Chicago. In the letter reprinted here, Bethke claims that everyone with «any capacity to grow» can benefit from home study. It might take a long time to finish the work, but that is a great advantage: «you progress just as fast as your time and ability permit», one LaSalle pamphlet promised[3]. The widespread use of aptitude tests might work in college, but it would unfairly discourage many candidates for mail order instruction:

April 14, 1926
Mr. F.P. Keppel
Carnegie Corporation
522 Fifth Avenue
New York, N.Y.

Dear Mr. Keppel,

I want you to know that I have very thoroughly enjoyed your masterly article on *Education for Adults* in the «Yale Review» for April. Your analogy of the professional soldier and the militia pictures the relationship most vividly. Your emphasis on the extension of tests of aptitude is most timely. I should like to raise a question on one point that you make, namely: that these measurements of capacity 'are obviously more important in extramural education

[1] F. Keppel, *Education for Adults*, «The Yale Review», vol. XV, n. 3, 1926, p. 421.

[2] *Ibid.*, p. 431. For a clear account of the rapid rise of intelligence tests, see P. Chapman, *Schools as Sorters: Lewis M. Terman, Applied Psychology, and the Intelligence Testing Movement, 1890-1930*, New York, New York University Press, 1988.

[3] *Law Training for Leadership*, Chicago, LaSalle Extension University, 1931, p. 21.

than within the four walls of the college classroom'. In one sense that idea might be very strongly endorsed, but there is another angle to it. In college classrooms we must necessarily select our group so as to make a homogeneous group by virtue of previous education, age, interests, and abilities. Too great extremes in any of these factors are a disadvantage. We know how difficult it is to adjust teaching to the person of lowest ability and the person of highest ability at the same time.

In correspondence study that problem is very much less important. Each member is in a class by himself. He goes as fast or as slowly as his time and ability permit. He is not holding anyone back, nor is anybody holding him back. It seems to me quite conceivable that a person who from the standpoint of class efficiency might be excluded from a resident class, may nevertheless gain very considerably by a correspondence course in which he would progress as rapidly as his own accomplishments permit. It seems to me therefore that so long as one has any capacity to grow he is a logical candidate for home study work and it would be denying home study work its full opportunity if such a man were excluded from the privilege of gaining all that he could. Whatever gain he makes is a net gain to himself and should be an asset to society.That condition in home study work has made it extremely difficult for us to work out a practicable plan for testing ability that will serve a really constructive purpose. As a matter of practical experience doesn't every such student reveal his capacity to grow and his willingness to apply himself in what he accomplished? If it takes one student one year, and another student three years to accomplish the same purpose, both have been benefited, and how could either the student or the school have been benefited substantially by subjecting such a student to a formal ability test? Time and uniformity are two indispensable conditions in a resident class, but both are adjustable to the individual situation in correspondence education. At least, that is a viewpoint suggested out of considerable study of this problem, that naturally occurred to me in relation to your statement, and in view of your fine interest in this field I felt that I might pass it on. We are extremely interested in the practical use of these tests in connection with our work, but it seems to me that in correspondence school work tests must be used for another purpose than selection and exclusion because this method of instruction affords an opportunity to handle such cases that is not possible in the resident class[4].

Bethke preferred another way to protect students of modest ability: an association of for-profit correspondence schools that would set standards, investigate complaints, and report fraud to state and federal authorities. In 1925 and 1926 he worked with Keppel to create the National Home Study Council (NHSC). At that time Carnegie also launched the American Association for Adult Education, an organization to coordinate and underwrite non-vocational and non-profit activities. Libraries, museums, and other sponsors of the liberal arts would receive nearly six million dollars from the foundation in the next 15 years[5]. In contrast, Carnegie appropriated only $3,000 for the NHSC. The for-profits would have to tax themselves to sustain their trade association. Keppel shut his wallet, but he was willing to offer advice from time to time, including a thoughtful response to Bethke's April 14, 1926 letter. Keppel replied under

[4] The Bethke and Keppel letters are in Box 253, Folder 4, Carnegie Corporation Papers (Columbia University Rare Book and Manuscript Library).

[5] E. Lagemann, *The Politics of Knowledge: The Carnegie Corporation, Philanthropy, and Public Policy*, Middletown, CT, Wesleyan University Press, 1989, pp. 99-122.

his own name, but he copied without attribution much of what his good friend Edward L. Thorndike told him. One of the nation's most renown psychologists, Thorndike wrote extensively on educational measurement and even created several tests, including the admissions exam at his alma mater, Columbia University, where Keppel met him as undergraduates in 1897[6] What Thorndike stressed when he read Bethke's letter was the huge variation in innate ability. Individuals differ greatly, with heredity more important than upbringing or schooling. Thorndike rejected Bethke's faith that everyone should have as much as time as possible to learn. To soften the blow, Thorndike pointed out that good tests could help correspondence schools identify very bright prospects who underestimated their own talent. Furthermore, test scores could guide students to the most appropriate courses, which would increase the small fraction who eventually finished their classes.

April 27, 1926
Mr. William Bethke
LaSalle Extension University
Michigan Boulevard at 41st Street
Chicago, Illinois

Dear Mr. Bethke,
I have now had a chance to think over your kind letter of the 14th, and to consult some friends who know more about such things than I do, and I hope you'll forgive me if I maintain my position that measurements of capacity are more important in extramural education than within the college classroom. It is true that in correspondence study the pupils may go at a variable rate, and that consequently pupils who should be excluded from certain college classes might safely be included in certain correspondence courses. On the other hand, a student in college classes is constantly having the opportunity to compare himself with others and to see how he stands and to decide whether it is really profitable for him to try to do that work. This forms a large and emphatic part of his educational guidance. Human nature being what it is, it is more impressive to actually see that you are not up to the level of living friends and acquaintances with whom you are compared than to receive even very careful notices from the faculty of a school.
I think also that you possibly overemphasize the relative importance of time as compared with ability. Certain individuals could not secure a bachelor's degree, for example, if they studied for fifty years, and, in general, in subjects which are essentially intellectual, the amount of intellect which a person has seems to be the fundamental and essential thing. The abler person will do the work somewhat more quickly than the less able, but if a person cannot do it within a certain reasonable time, it usually is not desirable for him to try to do it. It would, to my mind, be very unfortunate, for example, to encourage students to take a law degree who would require nine years of residence study to do it, or to advise students to take a bachelor's degree who would require twelve years of residence study to do it. If you have any considerable number of students who are requiring three times the normal length of time, as your letter suggests, and if any form of psychological examination could have

[6] G. Joncich, *The Sane Positivist: A Biography of Edward L. Thorndike*, Middletown, CT, Wesleyan University Press, 1968, p. 105.

excluded them, I think that in the majority of cases the exclusion would have been a great benefit to them and to your institution.
The positive use for selection is perhaps of greater importance than the negative use for elimination. It is possible now to encourage gifted people to go ahead with study although their formal schooling has been irregular. In this respect the measurement of capacity should be very helpful to extramural education.
I appreciate the importance of your last paragraph. It is true in all schools that the use of these examinations for placement and guidance is, or soon will be, more important than their use in selection and exclusion. Here, too, I think the examinations are of even greater service to extramural education than to ordinary college education. The student in college is seen by his instructors and by his classmates, and has a good deal of information to use in guiding himself which the correspondence student lacks.
Either one of us could write many pages about this, and I hope that you will sometimes express your views and the results of experience with these examinations in correspondence school work.
Keppel and Thorndike lost. Using tests to screen potential students, for either admission or placement, did not happen. Many correspondence schools sent advice on how to study and also made the first few lessons easier than the rest, but none of them required or recommended tests to see if home study was a sensible choice. What mattered was ambition and determination: «I can, I will» was engraved on the little pin La Salle students received. As a result, no correspondence school set itself apart as truly selective, where admission by itself would have been a badge of merit because many others were rejected[7].

The NHSC schools also refused to jolt students by giving low grades on the work they submitted. At the largest correspondence school, 91% of the grades were A (63.5%) or B (27.5%), far more generous than college marks. «We are not interested in failing anyone», Bethke admitted. La Salle students who did poor work received 'rework sheets' for a second try[8]. Furthermore, a 1931 proposal to give closed-book examinations monitored by proctors went nowhere. In an era when B was an honors mark at American colleges, the sky-high grades and open-book tests were as damaging to the status of home study as the lack of selective admissions.

[7] A few schools claimed they screened applicants. The Federal Schools said that 15% to 20% of the replies to their *Draw Me and Win a Scholarship*" advertisement were not answered. For those marked "poor", the salesmen were told to look at more samples before enrolling a prospect. Transcript of the 1940 NHSC annual meeting (Distance Education Accreditation Commission Archives, Washington D.C.), p. 127. One home study school had unusually talented students—the American Institute of Sacred Literature attracted ministers eager to learn ancient languages—but that occurred by self-selection rather than competitive admissions. K.N. Beck, *The American Institute of Sacred Literature*, Doctoral Thesis, Department of Education, University of Chicago, 1968.

[8] Transcript of the 1938 NHSC annual meeting, pp. 14-17.

In 1928 Thorndike elaborated his views in Adult Learning[9]. He again asserted that innate ability mattered; so did motivation, good instructional materials, and Bethke's favorite variable, time. He also mentioned another consideration: longstanding habits and firmly held beliefs can hinder the acquisition of new knowledge and skills. It would be many years before educational psychologists fully appreciated the importance of this aspect of learning – the need to unlearn – and thus the correspondence schools missed an opportunity to shed light on a neglected topic. So the thousands of students enticed by savvy salesmen and alluring advertisements made correspondence schools the most diverse educational option ever seen in this country. No other schools in the early 20th century came close to the heterogeneity in mail order education. But this

triumph of open access carried a steep price. Very few finished, yet everyone was expected to pay for what they had abandoned. In 1939, an officer of one NHSC school for refrigeration and air conditioning eloquently described the consequences[10]:

> We have people ranging in age from 16 to 66 who want to take our training. We have people who were on relief and people who were presidents of small concerns, people who had nothing and people who were rich. We had people who had withered arms, deaf, blind, suffering from collapsed lung, etc., individuals who had never gone to school beyond the sixth grade and engineering graduates. Now that is a tremendous spread of human beings. They were all caught up with the romance of air conditioning and we said a lot of things about air conditioning that we would have been better off had we spoken more conservatively. But, here they were. Now to begin with, thirty percent of that group could not have been placed in the field even if they had the training, another twenty percent did not have the adaptability for the work, and yet under ordinary extension training conditions every Tom, Dick, and Harry who has a ten dollar bill and a hope for another one next month, can become enrolled in an extension program.
> And why was that so bad?
> People begin to train and they suddenly discover they can't get it and they want to quit, and then some of us begin to put high pressure methods on them. They begin to talk to other people about the mean way we are treating them – they may even be taken into court because you have a legal contract – and that starts a whole train of negative events that widens and widens until it reaches the preacher, the lawyer, the policeman, the magistrate, the principal of the high school, the doctor of the community, the teacher, and the parents of boys who want to get ahead [all resentful that the school tried hard to collect the unpaid balance on the contract]. You develop a negative attitude toward the opportunities and possibilities of extension training, an attitude of suspicion that is more alive today than ever before. In my opinion, it began because we did not recognize that there is a factor of intelligence that operates in learning. We cannot write these courses down to the level of the lowest moron who wants to enroll, because if you did you would spend indefinite time getting through the alphabet.

9 E. Thorndike *et alii*, *Adult Learning*, New York, Macmillan, 1928.
10 Transcript of the 1939 NHSC annual meeting, p. 128.

As high school and college enrollments surged in early 20th century America, even the "lowest moron" without a diploma could find a second chance. Education through the mail inspired dreams of new careers and higher incomes. But as Thorndike and Keppel warned, not everyone could transform their world just because they had good intentions. Thousands of ambitious Americans would have saved time and money if they had realistically assessed their aptitude before signing a contract to study material that was beyond their grasp.

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Scuola, memoria, storia. A proposito di un recente volume

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School, memory, history. About a recent book

ABSTRACT: This critical note presents a recent study focusing on the oral sources in the historical-educational research. Through the collection of oral testimonies of former teachers and alumni, the authors show many aspects of elementary school in Marche region in the twentieth century, such as corporal punishment, teacher training and school reforms. Moreover, the authors demonstrate the important role of oral sources in the historical-educational context to reconstruct the 'real history' behind the 'legal history' studied through manuals, pedagogical magazines and legislation.

EET/TEE KEYWORDS: Oral history; History of education; Memory; Italy; XXth Century.

Carmela Covato

Secondo Tony Judt, uno degli storici contemporanei che ha dato contributi assai significativi sui limiti e sulle potenzialità del ricorso ad un'ampia tipologia

di fonti nei percorsi storiografici più recenti e innovativi, l'attenzione posta in modo sempre più diffuso alla 'memoria' contiene potenzialità enormi quando non si dimentichi il pericolo che essa, presa in considerazione in una forma decontestualizzata, possa tendere a confermare se stessa[1].

Se ci addentriamo in un campo d'indagine più specifico, non si può non constatare, tuttavia, quanto la 'memoria scolastica' abbia rappresentato uno spazio conoscitivo che ha indubbiamente contribuito, all'interno delle più recenti indagini condotte a livello nazionale e internazionale, a rinnovare in modo assai significativo l'identità interpretativa e metodologica degli studi storico-educativi.

Grazie al ricorso a nuove tipologie di fonti, sulla base di un approccio metodologico di carattere necessariamente interdisciplinare, studiare la memoria scolastica ha significato, infatti, indagare tanto i modelli di scuola, insegnamento, apprendimento e scolarità emergenti dalle memorie individuali e collettive quanto la rappresentazione che di tali realtà è stata proposta nel corso degli ultimi decenni dalla storiografia più tradizionale e dalla cultura ufficiale più diffusa.

In questo nuovo scenario, un contributo molto significativo allo sviluppo di un tipo di indagine in grado di costruire un legame nuovo fra storia e memoria, da una parte, e fra storia locale e nazionale, dall'altra, è l'innovativo, recente volume di Lucia 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*).

La ricerca in ambito storico-educativo ha vissuto – come molto opportunamente mette in rilievo Lucia Paciaroni nell'incipit della sua avvincente indagine – dall'inizio del secolo scorso ad oggi un processo di profondo rinnovamento, che ha visto spostare l'attenzione dalla storia delle idee pedagogiche a quella della scuola e delle istituzioni educative, considerate per molto tempo «espressione di una storia minore o, in altri casi, come un esercizio di semplice ricostruzione filologica»[2].

E, a conferma di quanto affermato, l'Autrice riassume alcuni aspetti fondamentali dei nuovi percorsi storiografici facendo riferimento alle molteplici riflessioni maturate in proposito all'interno di un'ampia e stimolante saggistica (si pensi, tra gli altri, agli studi di Giorgio Chiosso, Roberto Sani, Juri Meda, Alberto Barausse) nella quale individua con accurata attenzione una serie di riflessioni sul rapporto fra le suggestioni storiografiche scaturite dalla rivoluzione annalista e gli sviluppi che ne sono seguiti negli studi storico-educativi, quali

[1] Si veda, a questo proposito, T. Judt, *Lo chalet della memoria. Tessere di un Novecento privato*, Roma-Bari, Laterza, 2011. Sulle ricadute storico-educative, si veda R. Sani, *Education, school and cultural processes in contemporary Italy*, Macerata, eum, 2018.

[2] 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, p. 11.

l'aspirazione a ricostruire la totalità e la materialità del passato (dunque anche della scuola, dell'identità dei soggetti che l'hanno animata – soprattutto allievi e insegnanti – delle caratteristiche degli ambienti, delle aule e degli arredi scolastici) consentendo il passaggio dall'ideale al reale, dalla funzione leggittimatrice ai vissuti e alle rappresentazioni reali. In questa ottica, com'è noto, ogni lascito del passato ha cittadinanza di documento (perfino la menzogna, la mistificazione e la distorsione degli eventi) legittimando così i «testimoni loro malgrado», come ebbe a definire le nuove fonti Marc Bloch nella sua *Apologia della storia*[3], successivamente suffragata «rivoluzione documentaria» messa a punto da Jacques Le Goff[4].

In questa prospettiva, infatti, ogni oggetto, ogni lascito del passato giunto fino a noi porta in sé le tracce dell'agire degli uomini nel tempo, indipendentemente dalle ragioni per cui è stato creato e dall'uso a cui era stato destinato. Diviene quindi una fonte a tutti gli effetti.

Così è per le fonti orali.

In particolare, sostiene l'Autrice, a questo proposito

> L'impiego delle fonti orali nella storia dell'educazione costituisce una innovazione nella ricerca contemporanea, a livello nazionale e internazionale. Negli ultimi anni gli storici dell'educazione hanno iniziato ad esplorare le ampie potenzialità euristiche di questa tipologia di fonti, iniziando a dedicare una crescente attenzione nei confronti dei racconti e delle storie di vita che i protagonisti della storia contemporanea sono chiamati ad esporre affinché possano essere condivisi, tramandati alle nuove generazioni e, naturalmente, utilizzati per la ricerca storico-educativa[5].

Il ricorso ad una molteplicità di fonti ha comportato molte e profonde innovazioni. Lucia Paciaroni ne riassume, in una sintesi molto efficace, alcuni fra i principali percorsi: dalla categoria di *culture scolaire* introdotta da Dominique Julia, alla storia delle discipline di Marc Depaepe e di Frank Simon, alla centralità dell'aula scolastica introdotta da Ian Grosvenor, Martin Lawn e Kate Rousmaniere, un tema ripreso poi anche nell'area iberica, dalla quale nel 2007 arriva un segnale molto importante quando «lo storico Augustín Escolano Benito dedica un volume alla cultura materiale della scuola in cui emerge la necessità di non considerare l'oggetto materiale solamente dal punto di vista della sua evoluzione storica e materiale ma di cogliere la relazione esistente tra essi e il loro contesto di produzione e di impiego»[6].

[3] M. Bloch, *Apologia della storia*, Torino, Einaudi, 2009.

[4] J. Le Goff, *Storia e memoria*, Torino, Einaudi, 1982. Per un'analisi delle significative anticipazioni di un nuovo paradigma di storia sociale dell'educazione in Italia, fra Otto e Novecento, cfr. J. Meda, *I «Monumenta Italiae Paedagogica» e la costruzione del canone pedagogico nazionale (1886-1956)*, Milano, FrancoAngeli, 2019.

[5] Paciaroni, *Memorie di scuola*, cit., pp. 36-37.

[6] *Ibid.*, p. 15.

A partire da queste considerazioni, l'Autrice svolge alcune importanti riflessioni e centra la sua attenzione su chi, fra gli esponenti dell'indagine storico-educativa, su quali gruppi di ricerca e iniziative editoriali, su quali realtà museali, archivistiche o centri di ricerca abbiano meglio interpretato queste nuove istanze.

È stato così che anche in Italia, osserva Paciaroni, gli storici dell'educazione hanno iniziato ad indagare le potenzialità euristiche di un'ampia gamma di 'nuove fonti': quaderni e fotografie scolastiche, cataloghi commerciali delle case editrici scolastiche e delle ditte produttrici di arredi e sussidi scolastici e libri per l'infanzia, periodici pedagogico-scolastici, manuali scolastici e libri per l'infanzia, sussidi didattici, arredi scolastici e fonti orali[7].

E proprio sulle fonti orali si basa la ricerca di Lucia Paciaroni finalizzata a raccogliere numerose testimonianze di ex maestri e maestre e ex alunni e alunne che hanno frequentato la scuola elementare nella regione Marche, in particolare tra gli anni Trenta e gli anni Ottanta del Novecento.

Le storie di vita degli intervistati hanno contribuito a ricostruire la 'storia reale' dietro quella 'legale' studiata attraverso la manualistica, la stampa pedagogica e la legislazione permettendo, quindi, di approcciarsi ad una storia della didattica, dei costumi scolastici e delle reali pratiche educative svolte in classe. «Nel corso della ricerca, durata tre anni, sono state intervistate 52 persone, di cui 39 ex maestri e maestre 13 ex alunni e alunne e sono stati organizzati 53 incontri, in quanto, con uno dei testimoni ne sono stati tenuti due a distanza di qualche mese»[8]. Alcune interviste sono state svolte presso il Museo della Scuola «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata, molte altre presso l'abitazione dell'intervistato e la scelta fra registrazione vocale o video camera è stata affidata a ciascuno di loro.

Molti insegnanti hanno fatto riferimento ad appunti personali, diari e fotografie.

Tutte le interviste sono state condotte sulla base di un questionario, che ha richiesto una lunga e meditata elaborazione, le cui domande, nel caso degli insegnanti vertevano sulla formazione sull'insegnamento e sulle pratiche educative; tema, quest'ultimo, presente anche nelle interviste ad ex alunni, insieme a domande sulla scuola come luogo di formazione e socializzazione. Entrambi i questionari sono riportati integralmente nella nota 30[9].

Proprio sulle modalità con le quali sono state condotte le interviste, sull'influenza dell'intervistatore e sulla fluidità e irripetibilità del flusso comunicativo, Paciaroni si sofferma citando le riflessioni più significative condotte negli ultimi anni proprio sui limiti e sulle potenzialità delle fonti orali (Luisa Passerini, Alessandro Portelli, Nuto Revelli, per fare solo alcuni esempi).

[7] *Ibid.*, p. 25.
[8] *Ibid.*, p. 55.
[9] *Ibid.*, pp. 60-61.

Pur avendone fatto il centro della sua ricerca, l'Autrice non trascura di evidenziare, insieme alle enormi potenzialità, anche i possibili limiti del ricorso alle fonti orali e li riassume efficacemente quando afferma che:

> La memoria ha indubbiamente un ruolo centrale nella ricerca attraverso le fonti orali ma uno dei principali motivi per cui esse, per lungo tempo, sono state lasciate a margine della ricerca storiografica, riguarda proprio la loro stessa natura, ossia l'essere «una fonte di memoria», legata al ricordo di una persona che viene chiamata a raccontare il suo passato, rispetto al quale il più delle volte è trascorso molto tempo. Inevitabilmente, ciò comporta il dover tener conto di una serie di fattori che potrebbero influenzare la narrazione, come l'inevitabile processo di invecchiamento della mente umana che potrebbe provocare distorsioni della memoria, ma anche i cambiamenti ideologici, culturali e sociali che potrebbero aver condizionato il testimone in una diversa interpretazione del passato a distanza di molto tempo[10].

Lucia Paciaroni, dunque, oltre ad illustrare attentamente la realizzazione delle interviste, le caratteristiche dei soggetti, la dislocazione geografica delle scuole coinvolte mette opportunamente in rilievo il problema dell'attendibilità dei ricordi dal punto di vista storico e conoscitivo. Narrare se stessi significa, infatti, sempre e comunque interpretarsi.

Si pone, allora, il problema di elaborare la memoria in un percorso interpretativo che non può non fare riferimento ai contesti e alle questioni storiografiche di carattere più generale, a quelle 'domande' cuore di ogni ricerca che richiedono in ogni caso la comparazione con molte fonti e il ricorso ad una ampiezza metodologica, euristica e epistemologica adeguate.

In questo senso, mi permetterei di osservare che non ritengo corretto parlare di 'storia orale' pur essendo questa categoria molto diffusa all'interno di un radicato costume storiografico, del quale Paciaroni ci mostra con acume sia le potenzialità sia i rischi e i possibili limiti, ma di una ricerca storica che sia fondata anche sulle fonti orali, così come non si parlerebbe mai di storia letteraria o di storia iconografica, sebbene Arìès[11], per fare solo un esempio, per altro assai autorevole, abbia fatto uso delle fonti pittoriche nel costruire gli studi di storia dell'infanzia e della famiglia.

L'Autrice supera decisamente il rischio di una categoria storica fondata sulle fonti ed ha il merito, in questo contesto, di saper collegare le voci provenienti dalla narrazione orale degli intervistati ad una approfondita indagine dello sviluppo della scuola reale e della materialità educativa nell'arco di tempo preso in esame, compiendo, così, un passaggio ineludibile, al fine di fuoriuscire dalla individualità del ricordo e dalle possibili ambiguità in esso sottintese, dalla «memoria alla storia».

[10] *Ibid*., pp. 72-73. Sulle ambivalenze e le innumerevoli implicazioni del rapporto fra memoria e storia, cfr. F. Cimatti, *La fabbrica del ricordo*, Bologna, il Mulino, 2020; M. Flores, *Cattiva memoria. Perché è difficile fare i conti con la storia*, Bologna, il Mulino, 2020.

[11] P. Ariès, *Padri e figli nell'Europa medievale e moderna*, Roma-Bari, Laterza, 1968.

I temi trattati nel terzo capitolo (dai costumi scolastici alle pratiche educative ed alle esperienze professionali nelle testimonianze orali) sono una conferma della capacità dell'Autrice di stabilire un collegamento esistente fra le memorie raccolte nel corso delle interviste e l'indagine storica sui contesti scolastici, istituzionali e pedagogici sottintesi nelle prassi educative.

Vale la pena, a questo proposito, fare riferimento per esteso ai temi trattati proprio nel terzo capitolo che rappresenta la vera sintesi fra la descrizione delle fonti e l'indagine storiografica. L'Autrice si propone, infatti, di affrontare, ad esempio, i seguenti ambiti tematici: il ricorso a bacchette, sberle e orecchie d'asino in quanto reiterati dispositivi pedagogici e come i maestri ricordano le sanzioni disciplinari adottate in classe; i percorsi di formazione degli insegnanti e le esperienze professionali; il ruolo delle pluriclassi e delle classi uniche; le reazioni degli ex-maestri e maestre ai mutamenti in atto; gli echi della società e politica attraverso i ricordi degli ex-insegnanti e degli ex-allievi.

Una avvincente *Appendice*, nella quale vengono raccolte alcune fra le testimonianze più significative, conclude questo importante volume nel quale il ricordo approda alla conoscenza storica dell'età contemporanea e delle istituzioni scolastiche ed educative, contribuendo anche a sottolinearne la centralità politica e sociale troppo spesso disattesa nella coscienza collettiva.

Juri Meda

Nel 1995 – riprendendo un'espressione utilizzata per la prima volta nel 1970 dal sociologo Colin Lacey[12] – gli storici dell'educazione Marc Depaepe e Frank Simon indicarono la necessità di indagare le aule scolastiche in quanto luoghi di «relazioni educative evaporate», vere e proprie scatole nere della cultura scolastica, dalle quali era indispensabile tentare di recuperare ogni singola traccia delle pratiche educative – ortodosse e rivoluzionarie, lecite e illecite – che vi erano state condotte[13]. Sulla base di queste indicazioni, fu avviata un'intensa stagione di studi incentrata per l'appunto sulla storia dell'aula scolastica e della sua quotidianità educativa, che ha condotto nel corso del tempo allo sviluppo di altri filoni di ricerca paralleli, quale quello sulla cultura materiale della scuola e il suo impiego nell'ambito delle pratiche educative promosse negli ambienti di apprendimento formale. Lo spettro delle fonti utilizzate nell'ambito di tale faticosa campagna storiografica si è sensibilmente ampliato, arrivando

[12] C. Lacey, *Hightown Grammar: the school as a social system*, Manchester, Manchester University Press, 1970.

[13] M. Depaepe, F. Simon, *Is there any place for the history of "education" in the "history of education"? A plea for the history of everday reality in and outside schools*, «Pedagogica Historica», vol. 31, n. 1, 1995, pp. 9-16.

ad includere materiali non tradizionalmente impiegati nella ricerca storico-educativa. In questo campionario in continua crescita, hanno tardato molto – almeno nel nostro paese – ad essere incluse le testimonianze orali.

È come se il crescente interesse della storiografia nei confronti della «materialità educativa», riprendendo un'espressione coniata ormai molti anni or sono dal pedagogista Riccardo Massa, avesse in qualche modo penalizzato l'esplorazione delle potenzialità euristiche di «fonti immateriali», come i ricordi degli ex-insegnanti e degli ex-alunni/e della scuola di un determinato periodo storico, che sono in grado di restituirci informazioni fondamentali sulla «scuola reale» che si cela spesso dietro quella «legale» prescritta dalla legislazione scolastica e informata alle dottrine pedagogiche. Le fonti orali, infatti, sono forse le uniche a consentire allo storico di accedere alle *routine* educative portate avanti per inerzia al di là del loro naturale termine di decadimento, alle consce infrazioni dei divieti imposti dalle autorità scolastiche, alle non-conformità ideologiche e alla capacità di resilienza degli insegnanti nei confronti di riforme radicali della scuola e ai tabù pedagogici di ogni genere, ovvero a tutte le informazioni più eccezionali conservate all'interno della *black box of schooling* cui facevano riferimento Depaepe e Simon.

Il libro di Lucia Paciaroni si colloca all'interno di questo fenomeno storiografico e si propone di dimostrare le potenzialità euristiche delle fonti orali in ambito storico-educativo, ricostruendo proprio a partire da esse la storia delle pratiche didattiche ed educative nelle scuole marchigiane tra il 1945 e il 1985. Già nel 1994 Marcello Dei aveva indagato da una prospettiva eminentemente sociologica attraverso le testimonianze orali e i memoriali inviati da insegnanti italiani di entrambi i sessi in risposta a dei questionari le origini sociali, i percorsi formativi e l'attività professionale degli insegnanti elementari italiani tra l'inizio del secolo e il secondo dopoguerra[14]. Negli anni successivi tuttavia – in linea generale – la storia dell'educazione ha sostanzialmente ignorato le fonti orali, mentre in ambito anglosassone e nord-americano venivano avviati alcuni importanti progetti di ricerca, come quello promosso da Philip Gardner e Peter Cunningham e inteso a studiare attraverso tali fonti l'identità professionale degli insegnanti[15].

[14] M. Dei, *Colletto bianco, grembiule nero. Gli insegnanti elementari italiani tra l'inizio del secolo e il secondo dopoguerra*, Bologna, il Mulino, 1994.

[15] K. Weiler, *Remembering and representing life choices: a critical perspective on teachers' oral history narratives*, «International Journal of Qualitative Studies in Education», vol. 5, n. 1, 1992, pp. 39-50; R.J. Altenbaugh, *Oral History, American Teachers and a Social History of Schooling: an emerging agenda*, «Cambridge Journal of Education», vol. 27, n. 3, 1997, pp. 313-330; P. Gardner, P. Cunningham, *Oral History and Teachers' Professional Practice: a wartime turning point?*, «Cambridge Journal of Education», vol. 27, n. 3, 1997, pp. 331-342; P. Gardner, *Oral history in education: teacher's memory and teachers' history*, «History of Education», vol. 32, n. 2, 2003, pp. 175-188; P. Cunningham, *Professional identities and the watershed of war: teachers, histories and memories*, «Historia y Memoria de la Educación», vol. 1, n. 1, 2015, pp. 239-262.

I primi affondi della storiografia educativa italiana in questo ambito sono quelli condotti da Davide Montino nel 2008 e poi successivamente da Alberto Barausse, Gianfranco Bandini, Stefano Oliviero, Mirella D'Ascenzo e Fabio Targhetta, come ben ricostruisce l'autrice, pur senza dar vita a ricostruzioni sistematiche. Questo elemento è tanto più significativo – in termini storiografici – se si considera che nel nostro paese la storia orale aveva già iniziato ad affermarsi molti decenni prima con ricerche centrate sulle storie di vita delle persone comuni, di coloro ai quali tradizionalmente non era data voce nei documenti ufficiali, come nel caso delle prime pionieristiche opere realizzate negli anni Cinquanta da Rocco Scotellaro, Danilo Dolci ed Ernesto De Martino, mossi dall'interesse nei confronti delle culture popolari. Stando così le cose, come mai la storia dell'educazione ha accumulato tale ritardo storiografico? Come mai – mentre a partire dagli anni Settanta nella storia contemporanea la ricerca con le fonti orali definiva il proprio metodo e i propri confini euristici grazie ai lavori di Sandro Portelli, Giovanni Contini, Cesare Bermani e Luisa Passerini – la storia dell'educazione non avviava campagne sistematiche di raccolta di questo genere di fonti e ne sdoganava l'impiego?

Le motivazioni sono sicuramente molteplici. Ve n'è però una che è sicuramente preponderante e che ha a che fare con l'attendibilità di questo genere di fonti, ritenute soggettive e mutevoli a seconda dell'intervistatore, del contesto di raccolta, dell'intervallo temporale trascorso tra le esperienze vissute e la loro rievocazione. La fonte orale ha suscitato in tal senso più di una diffidenza, che ha finito col penalizzare l'impiego di questo genere di fonti nell'ambito della storia dell'educazione. L'autrice ricostruisce minuziosamente il complesso dibattito storiografico sviluppatosi intorno a tale questione, sottolineando come le testimonianze orali siano state considerate a lungo inattendibili «in quanto imprescindibilmente legate agli errori, alla parzialità e alla labilità della memoria» (p. 74) e come – proprio per questo motivo – lo storico debba tener conto di una serie di fattori che potrebbero condizionare e influenzare la narrazione, come l'induzione di ricordi attraverso la reiterazione di testimonianze altrui in età infantile, l'inevitabile processo di invecchiamento della mente umana, ma anche i cambiamenti ideologici, culturali e sociali che potrebbero condizionare l'interpretazione del proprio passato da parte del testimone. La scivolosità di questa fonte non ha sicuramente facilitato il ricorso ad essa da parte della storia dell'educazione, un ambito storiografico ancora giovane, il cui statuto epistemologico fu sottoposto a partire dagli anni Ottanta a un complesso processo di ridefinizione, concretizzatosi nell'irreversibile evoluzione da una storia delle idee e delle teorie pedagogiche a una storia sociale dell'educazione, poco propensa a ibridazioni interdisciplinari in quanto già impegnata nella fondazione d'una solida identità scientifica e più incline all'impiego di fonti canoniche.

È assai probabilmente a causa di ciò se gli storici dell'educazione non hanno avviato sistematiche campagne di raccolta e studio delle fonti orali. Questa

lacuna è oggi colmata anche grazie al libro di Lucia Paciaroni, che – completando il quadro già delineato alla fine degli anni Settanta da Antonietta Langiu e Liduina Durpetti ancora grazie alle testimonianze orali[16] – attraverso le circa quaranta biografie professionali di insegnanti marchigiani da lei videoregistrate nel corso del suo dottorato di ricerca è stata in grado di reperire informazioni fondamentali sul contesto sociale di provenienza degli insegnanti, sulla loro formazione e sulla loro esperienza professionale, con particolare riguardo al metodo didattico adottato, al mantenimento della disciplina in classe e alla comminazione di castighi e punizioni, alle modalità di impiego dei sussidi didattici, al rapporto con i colleghi e con le autorità scolastiche, alla loro reazione alle riforme scolastiche e a tutta una serie di altri elementi di estremo interesse.

Se per approfondire la formazione degli insegnanti e le loro reazioni nei confronti delle varie riforme scolastiche lo storico ha a disposizione altre fonti, l'unicità del contributo euristico della fonte orale emerge – come abbiamo già evidenziato in precedenza – dall'indagine su ciò che gli insegnanti non dovrebbero fare in classe e che pertanto raramente è riportato all'interno di altre fonti, se non quelle relative agli accertamenti condotti dalle autorità scolastiche e alle eventuali sanzioni disciplinari inflitte a causa di gravi infrazioni a quanto previsto dalla normativa.

Nella scuola di un tempo, tuttavia, gli interventi sanzionatori nei confronti degli insegnanti erano eventi abbastanza rari, riservati a coloro i quali reiteravano le proprie infrazioni nel tempo o erano protagonisti di episodi particolarmente gravi. Per quanto non esistano ancora studi sistematici su tali interventi sanzionatori, tanto da parte delle autorità scolastiche che di quelle comunali, a seconda del periodo storico analizzato, è possibile dire che la loro incidenza statistica è molto bassa. Se tuttavia confrontiamo questo dato con quello emergente dalle testimonianze rilasciate all'autrice dagli insegnanti in merito ai castighi e alle punizioni corporali comminate ai propri alunni in classe, ne esce un quadro assai meno confortante, nel quale «bacchette, sberle e orecchie d'asino» sono regolarmente utilizzati in classe fino a tutti gli anni Ottanta. Emblematico il caso della maestra Italia Mercuri, che confida di aver schiaffeggiato brutalmente una propria alunna semplicemente perché non aveva capito una lezione in classe e di essersene poi pentita (p. 102).

Se consideriamo che già il Regolamento del 15 settembre 1860 aveva vietato categoricamente agli insegnanti delle scuole italiane di utilizzare in classe «le parole ingiuriose, le percosse, i segni d'ignominia, le pene corporali, come il costringere a star ginocchioni o colle braccia aperte», non può non stupire il vedere ancora inflitti tali castighi nelle classi all'interno delle quali avevano lavorato gli insegnanti intervistati dall'autrice, alcuni dei quali in servizio nelle

[16] A. Langiu, L. Durpetti, *Maestri e maestre in Italia fra le due guerre*, Ancona, Consiglio Regionale delle Marche, 2004 («Quaderni del Consiglio Regionale delle Marche», n. 54).

scuole marchigiane fino alla fine degli anni Ottanta. Questo dato è estremamente interessante, in quanto è ipotizzabile che – come giustamente afferma l'autrice – un certo numero di insegnanti continuasse a disattendere le prescrizioni relative all'uso delle punizioni corporali in quanto tali pratiche si erano convertite in veri e propri *habitus* culturali, che finivano coll'esercitare su di essi un'influenza fortissima, inibendo in tal modo le competenze pedagogiche formalizzate da loro assimilate nel corso della loro formazione magistrale. È inoltre possibile ipotizzare che gli stessi maestri si adeguassero a tali pratiche per aderire agli standard educativi delle famiglie e compiacerne le aspettative, proprio come aveva avuto modo di riscontrare negli anni Sessanta Albino Bernardini in una scuola elementare della Barbagia[17]. Ma sarebbe interessante comprendere anche quale fosse esattamente il livello di tolleranza delle autorità scolastiche nei confronti di queste pratiche pedagogicamente eterodosse all'interno delle scuole, considerato appunto lo iato esistente tra la diffusione di tali pratiche e gli interventi sanzionatori ai danni di coloro che vi ricorrevano.

Questo libro, in conclusione, è un libro apprezzabile da più punti di vista. In termini storiografici, esso dimostra come anche la storia dell'educazione possa utilizzare assai proficuamente le fonti orali, confermando i risultati incoraggianti già ottenuti dagli altri autori precedentemente citati. In termini euristici, esso ci restituisce – per quanto limitatamente alla realtà marchigiana – un quadro per alcuni versi sorprendente della vita interna delle scuole, consentendo di studiare la reale diffusione di costumi educativi e pratiche disciplinari spesso non documentati dalle cronache ufficiali.

Alberto Barausse

A cavallo tra la fine del secolo scorso e il nuovo millennio abbiamo registrato la crescita vertiginosa del fenomeno memorialistico e, parallelamente, degli studi sulla memoria tanto da indurre qualche storico a parlare di «mondializzazione della memoria»[18]. Le ricerche storiche hanno mostrato come la memoria abbia giocato un ruolo importante già nel corso dell'Ottocento quando i nazionalismi e il processo di *Nation building* fu accompagnato dalla costruzione di una memoria nazionale finalizzata a modellare l'identità di un paese[19]. Una memoria intesa come «costruzione istituzionale» oggettivata in simboli, monumenti, celebrazioni finalizzati a ricordare e proporre eventi, personaggi,

17 A. Bernardini, *Le bacchette di Lula*, Firenze, La Nuova Italia, 1969.

18 H. Rousso, *Face au passé. Essay sur la memoire contemporaine*, Belin, Paris, 2017.

19 E. Hobsbawm, T. Ranger (edd.), *L'invenzione della tradizione*, Torino, Einaudi, 2002; B. Tobia, *Una Patria per gli italiani. Spazi, itinerari, monumenti nell'Italia unita 1870-1900*, Roma-Bari, Laterza, 1998.

luoghi significativi in funzione della «invenzione di una tradizione» e di un rafforzamento della «comunità immaginata» della nazione[20]. Ma i *Memory Studies* comparsi negli ultimi trent'anni si collocano in un contesto diverso, in un quadro segnato dalla crisi delle grandi narrazioni ideologiche seguite al crollo del sistema bipolare, dal processo di globalizzazione che ha innescato nuove tensioni e nuove paure che hanno fatto riemergere nuovi nazionalismi e nuovi conflitti etnici. Attraverso l'uso della memoria il racconto storico è stato profondamente rinnovato. Un mutamento che è stato, appunto, accompagnato dal consolidamento della memoria come strumento per continuare a fondare le identità collettive nel corso degli ultimi decenni, ma anche per dar luogo a forme del tutto inedite di politiche pubbliche e di rivendicazioni sociali: «Dai monumenti la memoria pubblica si trasferisce nei memoriali» ha sintetizzato con efficacia Gabriella Gribaudi[21]. La memoria della Shoah è stato il punto di partenza e il paradigma intorno a cui si sono sviluppati il discorso e la fortuna della memoria. La memoria, dunque, è diventata un valore fondamentale del nostro tempo, delle società democratiche, tanto da indurre a un ripensamento del rapporto tra passato e presente, a una collocazione della storia ai margini rispetto alla memoria, o addirittura a una sostituzione della memoria a discapito della storia[22]. All'interno di questo scenario e di questi percorsi della contemporaneità anche sul versante più strettamente storico scolastico si è manifestata l'esigenza di approfondire l'analisi delle forme attraverso cui le scuole, gli insegnanti, gli educatori, il mondo dell'educazione hanno posto il tema della memoria e del suo rapporto con la storia[23]. Recentemente, infatti, anche la memoria scolastica, sulla scia dei *Memory studies*[24], è stata oggetto di un tentativo di chiarimento

[20] B. Anderson, *Comunità immaginate. Origini e fortuna dei nazionalismi*, Roma-Bari, Laterza, 2018.

[21] G. Gribaudi, *La memoria, i traumi, la storia. La guerra e le catastrofi nel Novecento*, Roma, Viella Edizioni, 2020, p. 14.

[22] Proprio in relazione al dibattito tra storia e memoria un recente esempio del rapporto dialettico spesso polemico ma utile per comprendere l'evoluzione della storiografia contemporanea sulla questione, è stato offerto dal confronto tra due storici contemporaneisti, Marcello Flores e Gabriella Gribaudi sulle pagine de «L'Indice». Cfr. M. Flores, *Storia e memorie soggettive: un sincretismo possibile? La memoria dei traumi e la storia*, «L'Indice», giugno 2020; G. Gribaudi, *Nel laboratorio dello storico biografia e grande storia si incontrano*, «L'Indice», luglio-agosto 2020.

[23] Cfr. A. Vinâo Frago, *La Historia de la Educación ante el siglo XXI: tensiones, retos y audiencias*, in *Repensar la historia de la educación: nuevos desafíos, nuevas propuestas*, in M. Ferraz Lorenzo (ed.), 2005, pp. 147-166; Id., *La memoria escolar: restos y huellas, recuerdos y olvidos*, «Annali di Storia dell'Educazione e delle Istituzioni Scolastiche», n. 12, 2005, pp. 19-33; A. Viñao Frago, *Memoria, patrimonio y educación*, «Educatio Siglo XXI», n. 2, 2010, pp. 17-42; C.Yanes-Cabrera, J. Meda, A. Viñao Frago (edd.), *School Memories. New Trends in the History of Education*, Springer, Cham 2017.

[24] Nel testo che costituisce una sorta di riferimento per i Memory Studies J. Assmann ha proposto una distinzione di quattro tipi di memoria: la memoria mimetica, quella che concerne l'agire, la memoria delle cose, gli oggetti quotidiani quelli dello spazio materiale; la memoria comunicativa che si trasmette attraverso il linguaggio, la comunicazione quotidiana, lo scambio tra le generazioni; la memoria culturale che si traduce in riti, monumenti, scritti. J. Assmann, *La*

concettuale molto significativo per offrire agli studiosi un nuovo oggetto di analisi storica fino a parlare di memorie al plurale[25]. Molteplici sono, infatti, le forme attraverso le quali la memoria veicola le rappresentazioni della scuola e degli insegnanti. Le più recenti indagini, infatti, ci restituiscono un quadro assai articolato della memoria scolastica, dove accanto alle forme della memoria scolastica collettiva veicolate dalla finzione letteraria e dalla fiction popolare[26], dal teatro e dal cinema[27], così come quelle trasmesse attraverso le immagini[28] o altri media incontriamo le forme della memoria promossa dalle istituzioni pubbliche nel quadro di ben precise politiche pubbliche della memoria e che si esprimono attraverso la creazione di «luoghi della memoria scolastica» per riprendere una categoria storiografia introdotta da Pierre Nora e che per quanto riguarda la scuola, secondo gli studi di Connercton[29] ripresi da Meda e Vinão, assume forme diverse come i musei della scuola, i memoriali della scuola; e luoghi della memoria scolastica sono le vie, le piazze e gli edifici scolastici che espongono i nomi degli insegnanti, degli educatori e degli esperti nell'area della pedagogia; l'inaugurazione di targhe, busti e monumenti; il conferimento di decorazioni e distinzioni; la stampa di francobolli e monete commemorative; la celebrazione di funerali promossi dalle associazioni professionali e dalle istituzioni pubbliche in conformità a una memoria specifica[30].

Le forme della memoria collettiva e pubblica sono affiancate e arricchite da quelle della memoria scolastica soggettiva espresse attraverso gli ego-documenti

memoria culturale: scrittura, ricordo e identità politica nelle grandi civiltà antiche, Torino, Einaudi, 1997.

[25] Yanes-Cabrera, Meda, Viñao Frago (edd.), *School Memories. New Trends in the History of Education*, cit.

[26] A. Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, Macerata, eum, 2012.

[27] S. Cohen, *Postmodernism. The New Cultural History, Film: Resisting Images of Education*, «Paedagogica Historica», vol. 32, n. 2, 1996, pp. 395-420; J. May, J. Ramsland,, *The Disenchantment of Chilhood: Exploring the Cultural and Spatial Boundaries of Childhood in Three Australian Feature Films, 1920s-1970s*, «Paedagogica Historica», vol. 43, n. 1, 2007, pp. 135-149; J. May, *A Field of Desire: Visions of Education in Selected Australian Silent Films*, «Paedagogica Historica», vol. 46, n. 5, 2010, pp. 623-637.

[28] M.d.M. Del Pozo Andrés, *Imágenes e historia de la educación: construcción, reconstrucción y representación de las prácticas escolares en el aula*, «História de la Educación», vol. 25, 2006, pp. 291-315. Si vedano anche le presentazioni ai seguenti numeri monografici: F. Comas Rubi, M.d.M. Del Pozo Andrés, *Photography, propaganda and education*, «Historia, Memoria de la Educacion», vol. 8, 2018, pp. 9-21; B. Sureda Garcia, M. d M. Del Pozo Andrés (edd.), *Images of the European Child*, «History of Education & Children's Literature», vol. XIII, n. 1, 2018, pp. 11-16.

[29] P. Connerton, *How Societies Remember*, Cambridge, Cambridge University Press, 1989; Id., *How Modernity Forgets*, Cambridge, Cambridge University Press, 2009.

[30] Per la presentazione di alcune indagini che hanno iniziato ad approfondire tale ambito di ricerca si vedano J. Meda, L. Pomante, M. Brunelli, *Memories and public celebrations of education in contemporary times. Presentation*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 11-21; R. Sani, A.Ascenzi, *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.

– secondo la classificazione di Vinão – costituiti dai diari, dalle autobiografie, dalle memorie, ma anche e soprattutto dai ricordi personali recuperati attraverso le testimonianze orali[31]. Proprio lungo il versante della storia orale, che con una definizione pertinente è stata recentemente definita il «controcanto storiografico»[32] della costruzione della memoria pubblica, si colloca lo studio di Lucia Paciaroni[33] che si innesta, dunque, in un filone di studi che trae linfa dal rinnovamento storiografico che percorre la storia dell'educazione e lo arricchisce di una prospettiva poco coltivata dagli studiosi italiani rispetto a quanto perseguito nell'area francese o, soprattutto, anglosassone[34]. Come ci ricorda l'efficace titolo di un paragrafo della ricerca della giovane studiosa il rapporto tra la storia della scuola e le fonti orali è una storia difficile. Dopo la ricerca, di natura più sociologica, condotta da Marcello Dei all'inizio degli anni Novanta[35], in pochi tra gli storici dell'educazione, si sono avventurati lungo questo sentiero. Chi legge con attenzione il dibattito emerso nel corso di questi ultimi anni per trarne suggestioni, stimoli e spunti per la ricerca storico scolastica ed educativa, non può non rilevare il ritardo con cui gli storici dell'educazione hanno approcciato il metodo della storia orale per arricchire le conoscenze sul Novecento scolastico. Riprendendo una formula provocatoria usata da Stefano Pivato[36] qualche anno fa per spiegare il ritardo degli storici nel perseguire indagini serie, ben fondate metodologicamente, nell'ambito della storia dello sport, potremmo in maniera analoga parlare di una vera e propria pigrizia degli storici dell'educazione nel riconoscere importanza a scavi costruiti anche attraverso l'uso delle fonti orali. Nel cercare di individuare le ragioni del ritardo degli storici dell'educazione nell'introdurre i metodi della storia orale nelle proprie indagini, delle omissioni e delle rimozioni che ha conosciuto la memoria scolastica, la giovane studiosa individua il peso esercitato dalla cultura storiografica di matrice neoidealista. Una valutazione più che condivisibile[37] intorno a una eredità che, più in generale, ha esercitato

31 Viñao, *La memoria escolar: restos y huellas, recuerdos y olvidos*, cit., pp. 19-33.

32 Flores, *Storia e memorie soggettive: un sincretismo possibile? La memoria dei traumi e la storia*, cit.

33 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)*, cit.

34 Cfr. M.T., Frank, *Pour une histoire orale de l'éducation en France depuis 1945*, «Histoire de l'Éducation», vol. 53, n. 1, 1992, pp. 13-40; Gardner, *Oral History in Education: teacher's memory and teachers' history*, «History of Education», cit., pp. 175-188; Cunningham, *Professional identities and the watershed of war: teachers, histories and memories*, cit., pp. 239-262.

35 M. Dei, *Colletto bianco, grembiule nero. Gli insegnanti elementari italiani tra l'inizio del secolo e il secondo dopoguerra*, Bologna, il Mulino, 1994.

36 S. Pivato, *Le pigrizie dello storico. Lo Sport fra ideologia, storia e rimozioni*, «Italia Contemporanea», marzo 174, 1989, pp. 17-27.

37 In un saggio scritto qualche anno fa per presentare i contenuti di un progetto relativo alla costituzione di un «Archivio della memoria» presso il Centro di ricerca e di documentazione sulla storia delle istituzioni scolastiche, del libro per la scuola e della letteratura per l'infanzia dell'Università del Molise, avevo richiamato i condizionamenti della storiografia di matrice crociana

un freno rilevante nel rinnovamento delle indagini storiografiche nel campo dell'educazione e nella esplorazione di nuove fonti che, come nel caso della ricerca di Paciaroni presenta l'indubbio merito di offrire uno spaccato della scuola reale dietro quella legale «una nuova storia della didattica, dei costumi scolastici, delle esperienze professionali e delle reali pratiche educative»[38] Un retaggio, quello della storiografia di derivazione neoidealista, che ha reso e rende più complesso il rapporto degli storici dell'educazione con un approccio di lavoro che chiede un serio approfondimento degli aspetti metodologici. In proposito l'autrice del volume presenta una disamina molto ricca e articolata delle questioni più rilevanti dal punto di vista metodologico. Confrontandosi e riprendendo i numerosi spunti già presentati dagli storici oralisti[39], Paciaroni si addentra nelle molteplici problematiche concernenti la raccolta delle fonti – il ruolo giocato dal web nella ricerca e da quella del passaparola, soprattutto nei piccoli centri – l'intervista, il rapporto tra intervistato e intervistatore, i limiti e i rischi della memoria. Il lettore si trova di fronte all'esame di questioni apparentemente di poco significato che, invece, diventano fattori estremamente condizionanti l'esito e lo sviluppo delle interviste a partire dalla scelta del luogo della intervista, per passare alle problematiche determinate dall'uso del video, l'importanza di soffermarsi sul ruolo della comunicazione non verbale, la presenza di altre persone durante l'intervista, la funzione del mediatore, fino ad arrivare alla descrizione delle strategie nella conduzione dell'intervista da parte dell'intervistatore come l'impiego di fotografie o altri oggetti dal carattere evocativo sulla cui forza ha scritto considerazioni fondamentali lo storico spagnolo Agustin Escolano[40].

Particolarmente utili le considerazioni relative al questionario strutturato per raccogliere i dati durante l'intervista. Le tre macroaree focalizzate sulla formazione, sull'insegnamento e sulle pratiche didattiche non hanno impedito di scendere anche su terreni più scivolosi come quelli relativi non solo al contesto familiare ma anche al rapporto con il contesto politico e quello sociale, aspetti intorno ai quali si registra una maggiore diffidenza del corpo insegnante e di

sull'uso delle fonti orali nella storia dell'educazione. Cfr. 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. Un confronto di metodi, modelli e programmi di ricerca*, 3 voll., Lecce, Pensa Multimedia, 2013, Vol. II, pp. 539-560.

38 Paciaroni, *Memorie di scuola*, cit., p. 51.

39 Sulle numerose problematiche sollevate in sede metodologica si veda l'esame puntuale svolto nei seguenti lavori: L. Passerini, *Storia orale: vita quotidiana e cultura materiale delle classi subalterne*, Torino, Rosenberg & Sellier, 1978; G. Contini, A. Martini, *Verba Manent. L'uso delle fonti orali per la storia contemporanea*, Roma, La Nova Italia Scientifica 1993; A. Portelli, *L'uso dell'intervista nella storia orale*, in E. Cento, L. Di Ruscio (edd.), *Didattica della storia dell'800 e del-900. Un modello per la fruizione e la valorizzazione delle fonti documentarie*, Corazzano (Pisa), Titivillus, pp. 58-67; B. Bonomo, *Voci della memoria. L'uso delle fonti orali nella ricerca storica*, Roma, Carocci, 2015.

40 A. Escolano Benito, J.M. Hernandez Diaz, *La memoria y el deseo. Cultura de la escuela y educacion deseada*, Tirant lo Blanch, Valencia, 2002, pp. 107-133.

quello degli ex studenti. Come ci suggerisce Paciaroni, infatti, il questionario deve essere una guida per la conduzione dell'intervista caratterizzata dalla necessaria flessibilità capace di seguire «il filo dei ricordi del testimone». Un approccio che nel quadro più generale delle problematiche legate all'intervista e alla sua conduzione riescono a creare le migliori condizioni per raccogliere le testimonianze. E merita rilevare, insieme alla flessibilità, l'importanza della capacità di ascolto, la relazione empatica con l'intervistato perché, come ci ricordano gli esperti di storia orale «il racconto è il risultato di un dialogo, ma è anche uno "spazio di libertà" in cui il testimone può ripensare alla sua vita ricostruendone il senso, quello che le vuole attribuire in quel preciso momento»[41] I rilievi metodologici dell'autrice aprono, peraltro, un interrogativo particolarmente rilevante sulla preparazione dell'intervistatore che come ci ricorda la studiosa riprendendo le suggestioni di Contini «non è un soggetto passivo»[42]; e sulla necessità da parte degli storici dell'educazione di approntare dei momenti formativi specifici al fine di superare alcune ingenuità metodologiche che rischiano di impoverire il ricco potenziale delle fonti orali.

Paciaroni dedica, poi, pagine di estrema chiarezza su uno dei nodi più delicati relativi al dibattito sulla storia orale: il problema della attendibilità delle fonti orali ossia della affidabilità dei ricordi insieme a quello della arbitrarietà nella scelta delle testimonianze. La giovane studiosa si muove nella piena consapevolezza dei limiti della memoria, sia quelli legati al processo di invecchiamento della mente umana e alle conseguenti sue distorsioni, sia anche ai cambiamenti ideologici, culturali e sociali che possono condizionare il testimone e la sua interpretazione del passato. Ma Paciaroni non si sottrae al confronto metodologico e ricorda con altrettanta convinzione la necessità di mantenere il giusto equilibrio nell'approccio con le fonti orali, teso ad evitare «il pericolo», come anche recentemente è stato definito, di assegnare un significato esagerato alle testimonianze orali: una problematica da cui non risulta essere esente anche la documentazione d'archivio per la quale esiste il problema della «venerazione delle carte»[43]. E in tal senso mi sembrano pertinenti le osservazioni della ricercatrice che proprio intorno alla questione metodologica muove una serie di feconde considerazioni per chi intende intraprendere piste di ricerca fondate sulla analisi delle testimonianze orali. La studiosa ricorda la necessità di sottoporre anche le testimonianze orali al protocollo classico della metodologia storica quello della "critica del documento". E vale la pena ricordare per le fonti orali le osservazioni svolte qualche decennio fa da Jacques Le Goff sul documento/monumento. Per molto tempo si è pensato al documento come residuo imparziale e oggettivo del passato, al quale si attribuiva il valore di prova.

41 G. Gribaudi, *La memoria, i traumi, la storia. La guerra e le catastrofi nel Novecento*, Roma, Viella Editore, 2020, p. 40.

42 Paciaroni, *Memorie di scuola*, cit., p. 64.

43 Flores, *Storia e memorie soggettive: un sincretismo possibile? La memoria dei traumi e la storia*, cit.

Il "monumento", al contrario, avrebbe come caratteristica la intenzionalità, una volta che è costruito per perpetuare il ricordo, come è il caso delle opere commemorative di architettura e delle sculture collocate nelle piazze pubbliche. L'idea del "documento-monumento" porta questa intenzionalità per lo stesso documento, la cui produzione risulta dalle relazioni di forza che esistettero nelle società che lo produssero. È utile riportare quanto scrisse Le Goff:

Il documento non è una merce invenduta del passato, è un prodotto della società che lo ha fabbricato secondo i rapporti delle forze che in essa detenevano il potere. Solo l'analisi del documento in quando documento consente alla memoria collettiva di ricuperarlo e allo storico di usarlo scientificamente, cioè con piena cognizione di causa […] Il documento non è innocuo. È il risultato prima di tutto di un montaggio, conscio o inconscio, della storia, dell'epoca, delle società che lo hanno prodotto, ma anche delle epoche successive durante le quali ha continuato a vivere, magari dimenticato, durante le quali ha continuato a essere manipolato, magari in silenzio. Il documento è una cosa che resta, che dura, e la testimonianza, l'insegnamento che lui reca deve essere in primo luogo analizzato demistificandolo del suo significato apparente. Il documento è monumento. È il risultato dello sforzo compiuto dalle società storiche per imporre al futuro – volenti o nolenti – quella data immagine di se stesse. Al limite, non esiste un documento-verità. Ogni documento è menzogna. Sta allo storico di non fare l'ingenuo. […] un monumento è in primo luogo un travestimento, un'apparenza ingannevole, un montaggio. Bisogna anzitutto smontare, demolire quel montaggio, destrutturare quella costruzione e analizzarne le condizioni in cui sono stati prodotti quei documenti-monumenti[44].

La precisa disamina delle questioni metodologiche ci introduce, così, nei contenuti della ricerca di Paciaroni che offrono uno spaccato significativo della condizione e delle caratteristiche del corpo docente e studentesco delle scuole marchigiane del Novecento. Il campione utilizzato per le interviste presenta alcune caratteristiche interessanti. I trentanove tra maestri e maestre non costituiscono un insieme omogeneo, visto che le loro esperienze professionali si sviluppano lungo un arco temporale che va dalla fine degli anni Trenta all'inizio degli anni Settanta. Tuttavia questo dato non impedisce di rilevare alcune utili elementi: gli intervistati non sembrano, ad esempio, aver avuto una vita professionale contraddistinta da un alto tasso di mobilità extra regionale avendo realizzato, prevalentemente, il loro percorso professionale nel contesto marchigiano. Un dato particolarmente interessante che arricchisce la conoscenza delle caratteristiche del corpo docente italiano del Novecento intorno a una questione su cui recentemente l'indagine storiografica ha dedicato

[44] J. Le Goff, *Documento/Monumento*, Torino, Enciclopedia Einaudi, 1978, Vol. V, pp. 38-48, p. 44.

una specifica attenzione[45]. Anche i tredici ex alunni costituiscono un campione disomogeneo considerando che la loro esperienza come studenti è distribuita su un periodo molto ampio, che va dall'inizio degli anni Trenta all'inizio degli anni Sessanta e, dunque, dalle scuole del fascismo a quelle del primo ventennio repubblicano. Un campione, dunque, che se da una parte può presentare dei limiti di rappresentatività dall'altra offre la possibilità di verificare elementi di continuità e di discontinuità avvalendosi proprio di un arco temporale più ampio attraverso il racconto di percorsi soggettivi unici e irripetibili.

Le ipotesi pregresse, e le domande storiografiche che stanno a monte dell'indagine sembrano convergere sull'idea che le testimonianze orali lascino trasparire con più efficacia la scuola reale e le condizioni reali tanto degli studenti quanto degli insegnanti. In tal senso le testimonianze degli insegnanti e degli ex alunni sui costumi e sulle pratiche educative adottati nelle scuole rivelano un elemento di forte continuità nell'uso delle sanzioni disciplinari mettendo in luce lo scarto tra i dispositivi pedagogici ufficiali e le pratiche reali condizionate da consuetudini educative largamente accettate dalla comunità scolastica e locale, e, soprattutto, la condivisione e il rafforzamento delle azioni punitive da parte dei genitori che le ritenevano uno strumento correttivo nell'ambito dell'educazione famigliare.

Le punizioni corporali più diffuse come le bacchettate sulle mani, gli schiaffi, la genuflessione sui ceci, il cappello d'asino, si manifestano con continuità almeno fino all'inizio degli anni Settanta, momento in cui i mutamenti socio-culturali dettati dalla grande trasformazione dell'Italia, ormai avviata verso un mutamento generale dei costumi, porterà a una sensibilità diversa degli stessi genitori che inizieranno a manifestare maggiori resistenze e rifiuti verso tali pratiche e costumi radicati nelle aule scolastiche. Vale la pena sottolineare come la storia orale contribuisca a rafforzare la modifica delle tradizionali periodizzazioni che segnano i cambiamenti all'interno delle scuole suggerita dagli studi di storia delle culture scolastiche. In particolare emerge una "lunga durata" delle pratiche sanzionatorie, per riprendere il concetto di Braudel, veri e propri *habitus culturali* che rilevano la scarsa incidenza non solo degli orientamenti pedagogici elaborati nelle aule universitarie, ma anche delle pratiche riformistiche dei vari ceti politici.

Nella testimonianza di qualche insegnante la diffusa pratica delle punizioni corporali o verbali viene attribuita anche alla scarsa preparazione offerta dagli istituti magistrali. Estremamente interessanti le testimonianze relative ai percorsi formativi dei maestri e delle maestre. Anche in questo caso le fonti sembrerebbero rilevare alcuni elementi di forte continuità: la scelta delle magistrali condizionata dalle difficili condizioni economiche familiari – soprattutto per i maestri – piuttosto che da un fattore "vocazionale" e la

[45] M. Colucci, S. Gallo (edd.), *In cattedra con la valigia. Gli insegnanti tra stabilizzazione e mobilità*, Roma, Donzelli Editore, 2017.

strada della professione insegnante come quella ritenuta più adeguata per le ragazze e quella in grado di assicurare una crescita dello *status* socio-economico del genere femminile. Si assiste, davvero, a un quadro che richiama il lungo Ottocento piuttosto che il Novecento. Insieme a questi elementi si aggiunge la comune valutazione sull'insufficienza degli istituti magistrali per una adeguata preparazione degli insegnanti al loro esercizio professionale. L'autrice non ci da un quadro complessivo degli istituti magistrali e della loro natura – confessionale o statale – frequentati dai maestri e dalle maestre intervistati, ma cinque sono quelli che fanno riferimento a istituti ubicati nella regione marchigiana frequentati da dodici intervistati e due extra regione, Ravenna e Palermo[46]. In larga maggioranza le osservazioni dei maestri e delle maestre intervistati sembrerebbero convergere verso un giudizio negativo sulle esperienze condotte nelle scuole destinate, fino alla fine del Novecento, prima della introduzione della "riforma Berlinguer", alla formazione degli insegnanti. Considerazioni accompagnate, in particolare, da un giudizio di inutilità del tirocinio, spesso improvvisato, poco strutturato, privo di supporti teorici. Alle magistrali «era tutto molto teorico, era teorico più che pratico, la pratica ce la siamo fatta sulle spalle nostre» è l'espressione esemplificativa di una convergenza di vedute tra maestri e maestre. Proprio alla luce della scarsa efficacia del tirocinio risalta la funzione di surroga esercitata dalle supplenze o dalle lezioni private. Una inadeguatezza avvertita in modo ancora più accentuato tra le insegnanti che si sono prestate come *tutor* nei nuovi percorsi formativi universitari percependo lo scarto tra le loro esperienze e quelle delle nuove generazioni. L'impressione è che le testimonianze degli insegnanti confermino i limiti prodotti dal modello di formazione degli insegnanti perseguito dagli esponenti della pedagogia neoidealista nel corso di buona parte del Novecento. Ma qui avremmo bisogno di approfondire ulteriormente le ricerche a livello locale, integrare le fonti orali con specifiche indagini volte a una comprensione più approfondita dei contenuti curriculari, del corpo docente degli istituti magistrali che assicurarono nel corso della seconda metà del Novecento la formazione dei maestri e delle maestre. Ma il merito della ricerca è quello di aprire ulteriori varchi, di spingere la curiosità verso l'esigenza di conoscere in modo più approfondito quelle scuole magistrali frequentate dagli insegnanti, i professori soprattutto quelli di pedagogia, il tipo di cultura magistrale.

I limiti della formazione si riverberano sui metodi di insegnamento adottati durante l'esercizio professionale rispetto ai quali le testimonianze sembrano rivelare la prevalenza di un approccio molto legato alla esperienza personale. Non solo siamo piuttosto lontani da quel modello di insegnante riflessivo che oggi i dispositivi pedagogici e didattici sembrano esigere per assicurare un

[46] L'Istituto magistrale di San Giuseppe di Macerata, l'Istituto magistrale parificato di Senigallia, l'Istituto magistrale di San Ginesio, l'Istituto magistrale di Fermo, l'Istituto magistrale di Montegiorgio.

insegnamento più consapevole; ma anche da quelli agognati dallo stesso modello lombardo radiciano delle *Lezioni di didattica*. I decenni sono piuttosto ancora quelli in cui le nuove generazioni di insegnanti introdotte nel circuito scolastico italiano dovevano approcciare in maniera più artigianale che "artistica" o scientifica la professione: «uno se fa il metodo suo», «il metodo mio»[47], il metodo «si impara sul campo»[48], «il buon senso»[49] sono le espressioni tante volte ricorrenti nelle testimonianze. E a tal fine uno strumento importante continuarono a rivestirlo le riviste per gli insegnanti, altro elemento di forte continuità sorto nel secondo Otto e passato nel lungo Novecento. Strumenti che furono affiancati dal supporto dei maestri più anziani, e da quello delle madri maestre. Pochi sono i casi che rivelano l'attenzione ad alcuni metodi o esperienze che appartennero alla riflessione pedagogica del secondo Novecento che affiancarono il modello prevalente della maestra "mamma": in tali casi i richiami sono soprattutto alle esperienze dei "centri di interesse", del "metodo globale", insomma alla lezione di Decroly accanto a quella più isolata di Montessori o di Freinet promotore di tecniche di didattica attiva come il testo libero o il giornalino di classe.

Il bisogno di «arrangiarsi» a cui fanno riferimento tanti insegnanti è associato alle difficili condizioni dell'insegnamento incontrate dai maestri soprattutto nei primi anni di insegnamento. C'è un'Italia ancora poco conosciuta che fino alla fine degli anni Sessanta, primi anni Settanta, continua a vivere condizioni socio-economiche di arretratezza. Sono soprattutto tanti contesti rurali dell'area marchigiana a soffrire le lentezze di uno sviluppo economico che arriverà solo più tardi. Viva è la memoria degli anni di insegnamento trascorsi nelle scuole rurali o nelle scuole di campagna, soprattutto all'inizio della carriera. Vivo è il ricordo dei lunghi tragitti per raggiungere frequentemente luoghi isolati, impervi, con edifici precari destinati ad aule fatiscenti, prive di servizi igienici, del necessario carbone per la stufa o della stufa stessa; ma anche della fondamentale lavagna dove «c'erano solo li banchi e le seggiole»[50]. Aule frequentate da adulti e bambini contemporaneamente, lezioni svolte talvolta in fienili. Le testimonianze orali dei maestri e delle maestre ci suggeriscono di approfondire le indagini su una realtà scolastica, quelle delle scuole rurali o delle scuole collocate nelle frazioni di montagna, che avrebbe bisogno di scavi più estesi anche ad altri contesti regionali per lumeggiare i tanti modi di fare scuola disseminati nelle molteplici italie degli anni Quaranta, Cinquanta e Sessanta[51].

I racconti per raggiungere le scuole di montagna e quelle rurali sono tra i più ricchi di particolari descritti anche attraverso espressioni popolari tipiche del

[47] Paciaroni, *Memorie di scuola*, cit., p. 128.
[48] *Ibid*., p. 134.
[49] *Ibid*.
[50] Paciaroni, *Memorie di scuola*, cit., p. 146.
[51] Sulle scuole rurali ci si permetta di rinviare a A. Barausse, M. D'Alessio (edd.), *Processi di scolarizzazione e paesaggio rurale*, Lecce, Pensa Multimedia, 2018.

mondo rurale come «il 'cavallo di San Francesco' cioè a piedi»[52]. Condizioni particolari, destinate, in diversi casi, a determinare la necessità di adottare forme diverse di organizzazione scolastica con una distribuzione degli orari ben diversi da quelli ufficiali come quelli concordati dalla maestra Andruccioli[53]. Ma i racconti degli insegnanti aprono squarci inediti anche sulle condizioni di povertà di tanti bambini e delle loro famiglie, quelle contadine degli anni Cinquanta e Sessanta, raccolti in alcune immagini ben radicate nell'immaginario collettivo di tanti maestri e maestre, come quella dei bambini scalzi e della cura per il primo paio di scarpe.

Alla luce delle esperienze raccontate dagli insegnanti non deve, dunque, sorprendere l'atteggiamento di fronte ai processi di riforma introdotti nella scuola elementare. Le considerazioni degli insegnanti fanno riferimento, in particolare, a due momenti di significativo cambiamento introdotti nell'ordinamento dell'istruzione elementare. I decreti delegati dei primi anni Settanta e soprattutto i provvedimenti adottati dal ministro Mattarella durante il governo Andreotti che introdussero i moduli e la fine della esperienza del maestro unico nelle classi elementari[54]. Viene da chiedersi perché gli insegnanti rinviino e associno i momenti del cambiamento essenzialmente a tali due provvedimenti? Quanto il clima seguente al Sessantotto e alla contestazione studentesca determinò un arroccamento degli insegnanti su posizioni conservatrici, conformiste, di difesa dell'esistente? Quanto le caratteristiche ambientali dei contesti non solo scolastici nei quali si svolse l'azione professionale degli insegnanti intervistati contribuirono al mantenimento di un atteggiamento poco favorevole al cambiamento, di conformismo, nei piccoli centri distanti da quelli urbani e metropolitani entro i quali si esprimevano con più evidenza le manifestazioni della protesta, anche radicale? Sarebbe interessante poter raccogliere e disporre di elementi testimoniali per comprendere il cambiamento dello spirito più complessivo della categoria insegnante nell'arco dei quindici anni che separano l'emanazione dei decreti delegati dai provvedimenti di Mattarella. È tuttavia interessante rilevare come anche in questo caso sembra prevalere il disagio di tanti insegnanti che recepirono le disposizioni prodotte a livello ministeriale come calate dall'alto; e la fondamentale impreparazione rispetto a scelte politico-scolastiche attente a recepire e introdurre nelle scuole impianti pedagogici più adeguati ai cambiamenti sociali di una società, quella italiana, che negli ultimi due decenni del secolo si caratterizza sempre più come società complessa. Sembrerebbero emergere, ancora una volta, forme di resistenza

[52] *Ibid*., p. 148.
[53] *Ibid*., p. 147.
[54] Sui decreti delegati e sul clima in cui furono introdotti i cambiamenti nella gestione delle scuole si veda L. Ambrosoli *La scuola in Italia dal dopoguerra ad oggi*, Bologna, il Mulino 1982; per quanto riguarda i provvedimenti di Mattarella si rinvia a M.G. Dutto, *L'ambizione pedagogica. Analisi della riforma della scuola elementare italiana degli anni '80 e '90*, Milano, La Nuova Italia, 2003.

legate a un modello di insegnante caratterizzato da uno spiccato individualismo, impreparato ad affrontare le sfide del passaggio da una scuola del popolo alla scuola di massa.

In definitiva ci sembra, dunque, che la ricerca condotta da Lucia Paciaroni presenti indubbi elementi di originalità e offra una valida proposta sul versante storico-scolastico ed educativo, a chi si chiede se sia «possibile ipotizzare una narrazione sincretica delle vicende del passato che utilizzi le testimonianze soggettive come parte integrante e non separata della storia, in cui elementi soggettivi e oggettivi, memorie e fatti, strutture ed eventi riescano a trovare una sintesi, anche se provvisoria»[55].

[55] Flores, *Storia e memorie soggettive: un sincretismo possibile? La memoria dei traumi e la storia*, cit.; Gribaudi, *Nel laboratorio dello storico biografia e grande storia si incontrano*, cit.

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Some considerations on comparative studies of Chinese children's literature and foreign children's literature*

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ABSTRACT: The monograph under review constitutes a new attempt by a leading children's literature scholar in China to explore the rich and subtle connection of Chinese children's literature and foreign children's literature with a long historical span from the early twentieth century to the present. By focusing on key issues of debate among Chinese children's literature scholars including the notion of childhood, the birth of children's literature in China, and how foreign (especially Japanese and American) children's literature has influenced modern China and prompted it to produce its own children's literature that served to emancipate the Chinese people, Professor Zhu's book sheds new light on the thorny issues peculiar to Chinese children's literature, which, to use Professor Zhu's own words, was born in the context of import of foreign ideas in a passive way. The book therefore may be regarded as an attempt to dismantle the evolution of key ideas in children's literature from a comparative and international scope.

EET/TEE KEYWORDS: Children's literature; Comparative literature; Theory of children's literature; World literature; XXIst Century.

The monograph under review is the first book in the series *Children's Literature Studies in the New Century*, which is in fact a sequel to the influential research series *Children's Literature Studies at the Turn of the Century*. The

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publication of these two series, which share the same series editor, Professor Ziqiang Zhu, is coincidentally meaningful that, after more than twenty years of the publication of the first series, the new series celebrates the new research outputs by both prestigious scholars and emergent scholars at the same time, which attests to the burgeoning of the research field of children's literature in China. In this light, this new series works as a reflection and touchstone of how the discipline is developing prosperously in the current context of a new round of university building boosted by governmental funds. This monograph is authored by the series editor, Professor Ziqiang Zhu, who entered the shortlist of Brothers Grimm Award in 2019.

Professor Zhu began his academic career in Japanese literature, and ever since then he has kept a keen eye on Japanese children's literature. Although he has for the rest of his academic career mainly focused on Chinese children's literature, Japanese children's literature always serves as a starting point and frame of reference for him. This monograph is conveniently divided into two parts. Part One is comparative studies between Chinese and Japanese children's literature, and Part Two is comparative studies between Chinese and Western children's literature. Therefore, the monograph is a comprehensive research project into the comparative studies of Chinese children's literature with a full vision of «foreign children's literature». Following Jonathan Culler's famous observation that «a theory has to possesses certain complexity that cannot guarantee easy and obvious conclusion», the monograph endeavors to keep a theoretical interest and at the same time shares a common texture that is peculiar to children's literature studies in the new century.

Part I *Comparative Studies of Chinese Children's Literature and Japanese Children's Literature* has a special theoretical context. It has already been widely accepted in China that the notion of Chinese children's literature emerged in the early twentieth century under western enlightenment via Japanese culture[1]. It is commonly traced back to Zuoren Zhou, who was studying in Japan in the early twentieth century in the hope of reviving China with modern western knowledge. Professor Zhu's cultural archeological research proves that such essential words as "children's literature" was directly taken from the Japanese vocabulary[2]. Furthering this finding, he made further comparisons of important notions in the field of children's literature between Chinese and Japanese vocabularies at that time, such as "childhood", "fantasy", "fairytales", and "YA fiction." A much bolder and more innovative chapter following this is a comparison of war literature for children in China and Japan. It is found that after the war, both Chinese children's literature and Japanese children's literature have made their best effort to incorporate the criticism of war as one of their central themes, and Japanese children's literature is especially noteworthy as it

1 *Ibid*., p. 56.
2 *Ibid*., p. 72.

countered every wake of militarism in the mid-twentieth century. The following two chapters center on the brothers figures Zuoren Zhou and Shuren Zhou (Lu Xun) in the field of children's literature, who have played a pivotal role in bringing new Japanese ideas of children's literature from Japan to China. The two brothers spend long years in Japan to study, and their return to China has brought seminal ideas that were destined to change the landscape of Chinese intellectuals, literature being just an aspect of the whole spectrum. Professor Zhu then proceeds to situation the other prominent figure of the brothers, Lu Xun, and finds ample attention to children's literature by this pioneering literary and intellectual figure in China, whose influence emerged in the 1920s well into the new century via his role as a fighter for the freedom of the Chinese people. Lu Xun held a similar notion of childhood to his brother that the traditional Chinese culture is not favorable for the independent growth of the child but instead holds a suppressing and hegemonic attitude. The total cultural and material growing environment for the child did not consider the possibility of catering to the intrinsic interests and tastes of the child[3], but rather conforms to the adults desire to control and to manipulate the child, which more often than not emphasize a set of idealistic and moralistic ideology that are specifically suitable for adults. In order to prevent the tragedy of stifling children's nature in the prison-house of feudal ideologies, Lu Xun proposed total emancipation in the area of educational ideas. He proposed a children-orientated educational system that should consider the interests, motivations, and tastes of children for their better development, in which children's literature, instead of being a disinterested category, should take the initiative to function educationally in society. Following this new manifesto, Lu Xun turned his eyes to Japanese literature at that time and worked hard to introduce important children's authors who held similar ideas of childhood to China in order to change Chinese society[4]. This was in line with the whole revolutionary work of Lu Xun and has found important and obvious traces in Lu Xun's major literary works.

The last chapter in the first part explores the translation of Japanese children's literature in recent years since 1978. One important trend is the diversification of different genres that were previously intertwined with each other but began to diverge into fantasy, picturebooks, children's literature for literacy education, and popular children's literature. In all these aspects, the introduction and the translation of Japanese children's literature have played pivotal roles. The term picturebook in Chinese has two versions of translations, one being directly translated from Japanese and the other one translated literally from English. What is more, academic research on the picturebook in Japan has also been translated to China and to a certain extent helped to boost children's literature

[3] *Ibid*., p. 90.

[4] W. Qinan, *Cultural Interpretations of Chinese Children's Literature in the Twentieth Century*, Beijing, China Social Science Press, 2012, pp. 166-167.

research in general and picturebook research in particular in China. As for popular children's literature, its emergence is partly a result of imported foreign ideas and partly a result of the reform and opening up, which has brought all the publishers to a more market orientation from their previous fixed role in the planned economy. Since then, popular children's literature has become more and more a prominent section in the book market.

The second part of the monograph turns from the comparison of Japanese and Chinese children's literature to a wider scope of comparative studies. The beginning chapter still takes Zhou Zuoren, the seminal figure in Chinese children's literature as an example, but traces the influence not from Japan but from the US. Zhou Zuoren's idea was learned when he was studying in Japan, but the exact source can be traced to Porter Lander MacClintock's book *Literature in the Elementary School*[5]. The intersection between two college professors who were both thinking about literature in the elementary school prompted Zhou Zuoren to directly borrow Professor MacClintock's ideas to his own purpose. He admired the prosperity of the research of children, children's literature naturally included, in the US, to which he observed that the diversity of the research topic and the academicians were favorable factors for the development of children studies, a term that is more inclusive than childhood research or children's literature. Zhou Zuoren also introduced important research output, especially Stanley Hall's *Aspects of Child Life and Education* to China in an attempt to boost the development of children's literature and its research in China, especially for social welfare.

A more theoretical chapter that follows discusses the trend in children's literature theories in the twentieth century from the perspective of the relationship between Chinese children's literature and western children's literature. The gist of the chapter is a reevaluation of the question regarding the exact time of emergence of children's literature in China. In the past, there were basically two opinions. One held that it has a very long history in China for more than a thousand years (scholars in this camp including another leading scholar Wang Quangen[6], and Huang Qingyun[7]), and the other held that it was born out of the transplant of foreign importation during the early twentieth century of revolution. The divide of opinions is a different understanding of the proper definition of children's literature and its special social context in China. Professor Zhu argues that the legends and romances in ancient China cannot be classified into children's literature, though they have significant appeal to children, because children's literature should be founded on the proper notion of the child as distinct in psychological status and identity as

[5] *Ibid*., p. 121.

[6] Q. Wang, *Research of Children's Literature as a Phenomenon*, Changsha, Hunan Children and Youths Press, 1992, pp. 15-24.

[7] Q. Huang, *A Survey of Children's Literature in China*, «The Lion and the Unicorn», vol. 10, 1986, pp. 23-25.

from adults[8]. Sticking to this definition, he traces the emergence of children's literature in the early 1920s, which was out of foreign import[9]. This took place in the social context of introducing «advanced western social ideas to China to correct social ills and to save China from becoming a colony of the west. In this light, the birth of Chinese children's literature is different from common western national children's literature in the sense that its theory preceded its actual literary works for children. It was exactly under the guidance of these new ideas of children's literature that were thought to be helpful to bring out good citizens that children's literature was gradually experimented and worked out by revolutionary writers and educators[10]. Therefore, the birth of Chinese children's literature has a unique social and ideological function.

The next chapter has turned from national studies to theoretical studies of shift between modern and postmodern in children's literature, or, to be more specific, the debate over whether contemporary Chinese children's literature is a modern phenomenon or a post-modern phenomenon. The debate has been going on among Chinese researchers for more than ten years, and the central focus is on the defining nature of contemporary Chinese children's literature, which, according to some scholars, has already transitioned from a modern discourse to a post-modern discourse, but, according to Professor Zhu's opinion, such "transition" reveals the intrinsic contradiction between the modern and the post-modern. In its stead, he argues that Chinese children's literature is still in the phase of enlightenment with some characteristics of post-modern discourse. While a total radical stance of applying the sometimes self-contradictory post-modern intellectual resources to the studies of Chinese children's literature should not be endorsed, these post-modern intellectual resources should be appreciated for their contribution for challenging existing notions and constructing new theories in the context of new social parameters that have drastically changed in the recent fifty years.

The next chapter is probably the only chapter throughout the monograph that is devoted to the discussion of a single western scholar, Perry Nodelman and his *The Pleasures of Children's Literature*. While admitting the theoretical charm of the book and its illumination, Professor Zhu has kept a disillusioned mind during the reading process and tried to point out some of the confusion in this translated monograph. Of course, he also notes that some of the misunderstandings may not stem from Perry Nodelman but rather probably from the translation, which sometimes has been too extreme in applauding the achievement of the book, proclaiming that «this book has been an extreme

[8] Zhu, *Comparative Studies of Chinese Children's Literature and Foreign Children's Literature*, cit., p. 132.

[9] L. Ho, *China*, in *International Companion Encyclopedia of Children's Literature*, London, Routledge, 2004, p. 1032.

[10] M. Allsobrook, *Early-20th-century Chinese children`s literature: Self, state and story*, «Bookbird», vol. 44, n. 3, 2006, p. 7.

in the achievement of children's literature studies in every aspect»[11]. Zhu has also been quite cautious to quote Nodelman's precautionary statement that «we of course have our own prejudices and we should make our best efforts to help readers to realize their existence and their potential meaning»[12]. Zhu points out that Nodelman's notion that good children's literature presupposes innocent readers and therefore is literature for readers without language and life experiences is flawed in three aspects. First, it only considers experience but misses transcendental abilities such as perception and imagination. Second, it does not realize that the children's world has its own world experiences instead of being a world without experiences. Third, by defining children's literature for readers without language and life experiences Nodelman has chosen to ignore a great tradition composed by Romantic poets, German Romantic fairy tale authors, Lewis Carol, Mark Twain, and other authors whose works fall outside this narrow definition[13]. By doing so, Nodelman has deprived children's innocent way of gaining pleasure from reading. Citing Hillis Miller's preference that «I don't want to know *The Swiss Family Robinson* have an author because I prefer that all the world constructed by the book are not the imaginary work of some author»[14], Professor Zhu has provided an excellent example to illustrate the unique value of "innocent" reading that is peculiar to a child reader, which stands diametrically away from the much more experienced interpretation showcased in Nodelman's work.

Professor Ziqiang Zhu's monograph represents the careful thinking of a Chinese children's literature scholar on the thorny issue between China and the world. Although all the literary works discussed in the book are written by Chinese authors, their production and reception undoubtedly bear the mark of the cultural interchange between China and the world across historical periods. In this sense, the book deserves warm welcome for children's literature scholars in general, and for those who are specialized in comparative children's literature and cultural communications in particular. It would be a fruitful intellectual journey to explore how Chinese children's literature came into being and how it came into its present landscape.

[11] Zhu, *Comparative Studies of Chinese Children's Literature and Foreign Children's Literature*, cit., p. 230.

[12] *Ibid*., p. 232.

[13] P. Nodelman, *The Pleasure of Children's Literature*, Transl. by Chen Zhongmei, Shanghai, Shanghai Children and Youth Press, 2008, p. 154.

[14] H. Miller, *On Literature*, London, Routledge, 2002, p. 125.

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Reflections on children's adaptation of British literary classics*

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ABSTRACT: The monograph under review is one of the pioneering endeavors to explore the adaptation of English literary classics for children in a consistent and methodological way, spanning the long historical period from the eighteenth century to the twentieth century. Adopting narrative theory, literary stylistics, consumer criticism, and cognitive studies, it investigates how British literary classics are adapted for children from the aspects of stylistic adaptations and changes in narrative strategy. It also probes social factors of adaptation, such as consumer culture and educational ideas from a diachronic perspective, in an attempt to discuss the social and cultural drives of changes in the children's editions.

EET/TEE KEYWORDS: Adaptation for children; Children's edition; Literary classics; China; XVIIIth-XXth Centuries.

The collection under review makes a milestone contribution in the research of children's literature in general and in adaptation studies in particular in the sense that it has offered a consistent, focused and diachronic study of literary adaptation for children in a research field that is often occupied by more "piecemeal" study of adaptation for children often centering on a single case study in a given (and often limited) time period. It explores the strategy, trends, and patterns of adaptation of *Robinson Crusoe* and *Gulliver's Travels* from the early eighteenth century to the early twentieth century in a consistent and diachronic way. Moreover, with such focus on more "historic" adaptation

* This work is inspired by the reading of the recent volume H. Hui, *Children's Adaptation of British Literary Classics*, Beijing, Peking University Press, 2019, pp. 254.

for children, the monograph devotes its second half to a synchronic discussion of contemporary adaptation for children from a comparative perspective, i.e., by comparing the adaptation differences in the US and China in light of their different educational ideas and literary traditions, as well as the influence consumer culture poses on the school editions of literary classics. Thus, the monograph combines the consistent and illuminating historical study of literary adaptation for children and its modern variations under the influences of various societal factors. A third edge of the book is its application of the burgeoning cognitive narratology in the analysis of texts in literary adaptation for children, which sheds new light on the more traditional thematically-based criticism of adaptation studies. As Maria Nikolajeva illuminatingly argues, cognitive science has much to offer to children's literature research in a way hitherto pretty much under-discussed by other branches of research methods[1].

The book is divided into seven chapters. The introduction summarizes the development process of children's literature research in the west and China as the context of its research, as well as the status and trend of adaptation research in the larger field of children's literature research. The research of literary adaptation for children is indispensably a branch of children's literature studies and of adaptation studies, standing at their intersection, which both enriches those two areas of studies and for this reason is sometimes marginalized or even ignored. Recent trends in adaptation studies focus primarily on inter-medial adaptation, especially the adaptation of literary works on the screen, which is partly due to the strong rise of film studies and partly due to the more prominent features of inter-medial transference[2]. As for children's literature studies, more attention has been paid to the cultural readings of children's literature and national children's literature in different countries and across different historical periods, as well as new critical perspectives, among which adaptation is not given enough recognition. In this light, the call for and the attempt on research in literary adaptation for children is just in time[3].

The first half of the book, from Chapter 2 through Chapter 4, studies the adaptation of two novels – *Robinson Crusoe* and *Gulliver's Travels* – in the UK from the eighteenth century to the early twentieth century from the perspectives of thematic adaptation and social factors such as the changes of Christianity, construction of childhood and educational ideas. Chapter Two, taking *Robinson Crusoe* as an example, investigates contemporary reflection of

[1] M. Nikolajeva, *Reading for learning: Cognitive approaches to children's literature*, Amsterdam, John Benjamins, 2014, p. 2.

[2] A. Parey, S.W. Lassagne, *Adapting endings from book to screen: Last pages, last shots*, New York, Routledge, 2019, pp. 3-5.

[3] H. Hui, *China and the World: Children's Literature Studies as a Discipline and its Development*, «History of Education & Children's Literature», vol. XI, n. 2, 2016, p. 292.

Defoe's religious theme, or, a spiritual autobiography[4], in the children's edition from the eighteenth to the twentieth century, and reveals the rise and fall of Christian elements in the children's edition and different adaptation strategies. Their trajectories are not simply dependent or proportional, but are correlated in a complex way. With the definite decline of the influence of religion in daily life and in society, religious elements in children's books sometimes even reversely became stronger in an attempt to address social problems and to remedy the loss of the good old days that were more spiritually and emotionally connected[5]. It is a means for children's literature to serve its educational function and didactic role.

Chapter Three investigates the abridgment of political allusion, vulgar jokes and scatological taboos in children's editions of *Gulliver's Travels*, which abounds in the text and has incurred a lot of displeasure for its author, from the eighteenth to the nineteenth century. It discusses how the historical changes of the concept of childhood in British society led to different abridgment strategies and treatments of Swift's controversial text in different periods. The concept of childhood is a constructed societal concept and one of the fundamental concepts in children's literature. However, it varies across time and culture. For instance, before Rousseau, Europe generally regarded children as "petti" adults and lacked attention to children's unique psychological characteristics. The specific content of childhood will directly affect the landscape of children's literature and adaptation strategies in children's literature, leading to different degrees of retaining the original controversial language and different ways of bowdlerizing, which was often in negotiation with educational reforms (especially curricular reforms) at the time.

Chapter Four analyzes in detail the influence of educational ideas on the adaptation of *Robinson Crusoe*'s two eighteenth-century children's editions, especially the influence of Locke's educational ideas on the narrative restructuring of the novel, as well as the educational contents added to the children's edition, especially the education of scientific knowledge. Education and entertainment are one of the two major functions of children's literature since its birth. Educational ideas will inevitably affect the specific forms and contents adopted to realize this function and have a direct impact on the specific strategies and direction of adaptation. In particular, it connects John Locke's proposal of supervised practice with narrative embedding in the Stockdale edition and explores the disciplinary and educational role of the gaze in the hyper narrative level[6].

[4] G.A. Starr, *Defoe and Spiritual Autobiography*, Princeton, New Jersey, Princeton UP, 1965, p. 35.

[5] Hui, *Children's Adaptation of British Literary Classics*, cit., p. 38.

[6] *Ibid*., pp. 76-79.

Different from the diachronic perspective in the first half of the book, the second half is synchronic in its discussion of adaptation of children's literature from various theoretical perspectives such as cognitive narratology, educational adaptation, and curricular studies, and consumer culture, in an attempt to gain a more comprehensive understanding of the adaptation of children's literature and to complement thematic discussions in the first half of the book. Chapter Four goes beyond the general literary criticism and focuses on the relationship between adaptation and curricular standards in a special category of children's edition, i.e., the school edition designed for students based on curricular standards. It analyzes the relationship between the *Common Core Standard* in the United States and the setting and formulation of exercises in the edition designed for the Common Core, and explains the influence of the tradition of New Criticism and literacy education practice in the US. It is found that the Chinese edition aims more at how Crusoe's story should be understood primarily as a material for drawing traditional moral lessons, whereas the American edition treats it more as a reading material to develop student's reading and writing skills. Both educational adaptations exhibit modern endeavors to translate literary classics in the classroom for pedagogical purposes yet under quite different traditions in aesthetics, curricular practices, and educational contexts[7].

Chapter Five adopts Lisa Zunshine's cognitive narratology (with a particular focus on Theory of Mind) to discuss modern children's editions of Pride and Prejudice and Tom Jones. It analyzes the phenomenon of degradation of the complex nested mental structure of the original novel in the children's edition, and argues that this strategy in effect renders different personalities of the protagonists in the two novels, thus strengthening the function of moral education in the adaptation for children. In particular, Saddleback edition of *Pride and Prejudice* for many parts in the edition reduces the mental embedding in order to reduce the difficulty of interpreting Austen's masterpiece that has demanding requirements for figuring out the mental activities of its characters[8], whereas the adaptation of *Tom Jones* tries to exonerate Tom's sometimes easy nature with other female characters (or even affairs with them) by making Tom's thoughts more obscure and less reflective in other characters' thoughts and discourse. Both readings from the perspective of cognitive narratology have found unique issues with literary adaptations for children that is difficult to envision under traditional lenses.

The seventh chapter investigates the adaptation in the new curricular standard editions in China from a comparative perspective. Specifically, it investigates how educational ideas and Chinese culture exert their influence on the adaptation of western classics for Chinese students in terms of the direction laid down in the curricular requirements for complementary reading materials

[7] *Ibid*., p. 148.
[8] *Ibid*., pp. 164-165.

of western classics for the Chinese subject and how consumer culture influences the process of adaptation from a material perspective that involves the cover design, marketing strategy, and paratextual devices. It discusses the elements of consumer culture of the transformation undergone by *Robinson Crusoe* in the Chinese educational book market which is adapted as new curricular editions for Chinese pupils in their after-class reading. Consumer culture shapes the adaptation and turns this eighteenth-century English novel into a commodified literary and educational text in terms of marketing planning, which exploit the opportunities brought by the curriculum reform, the paratextual perspective of its cover design to better suit the electronic screen in the online purchasing environment, and the textual perspective of thematic and stylistic adaptations to conform to Chinese readers' hermeneutic expectations. It demonstrates a Chinese consumer culture that seizes the opportunity brought by the curriculum reform turning an English classic into a desirable commodity to arouse the purchasing desire of parents by catering for the curricular requirements and educational expectations[9]. In this light, this chapter forms a complementary to the previous chapter as they discuss school editions of British literary classics in two different countries in relation to their curricular standards and different literary traditions.

This monograph brings new and innovative developments in the field of adaptation studies and children's literature studies in the sense that it is the first book to study the adaptation of western children's literature in China. It is also one of the few pioneering attempts that try to stand at the intersections of eighteenth-century English literature, children's literature, narratology, stylistics, adaptation studies and produces an interdisciplinary research that tries to push every branch of its starting.

Children's literature research has developed for several decades in China, but it is still at a relatively slow pace, and it is mainly carried out by scholars from the Chinese department and department of education[10]. In contrast, research on western children's literature is relatively scarce. The research on adaptation of children's literature, naturally, has hardly been started. It is in this context that the monograph under review constitutes a valuable contribution to adaptation studies and children's literature studies. By combining narratology and stylistics, as well as other theoretical resources, it integrates the investigation of education, adaptation and cross-culture studies, thereby opening up a new possibility of research on the literary adaptation for children.

The book also helps to correct the prejudice on the adaptation of children's literature. The reason why many scholars often neglect the study of children's literary adaptation is that it has often been regarded and equated as simplification in both content and style. Through an in-depth and detailed

[9] *Ibid*., pp. 205-208.
[10] *Ibid*., p. 294.

analysis of literary adaptation for children across historical periods, national boundaries and generic conventions, this book shows that the adaptation of children's literature is not merely simplification, and sometimes it is simplified at all[11]. Hui's monograph not only reveals the rich connotation of the adapted works but also reveals many important factors that affect the adaptation of children's literature, such as the cultural atmosphere, ideology, social concepts, and generic conventions.

[11] H. Hui, *Appropriating Robinson Crusoe to be a Good Boy: Literary Adaptation in The New Robinson Crusoe at the End of the 18th Century*, «History of Education & Children's Literature», vol. XIII, n. 1, 2018, p. 446.

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Un grande affresco della vicenda pedagogica ed educativa italiana tra Otto e Novecento. A proposito di un recente saggio di Giorgio Chiosso

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A large fresco of the pedagogical and educational Italian affair between the Nineteenth and Twentieth centuries. About a recent essay by Giorgio Chiosso

ABSTRACT: Tis work intends to start a reflection on the Italian pedagogical and educational affair between the Nineteenth and Twentieth centuries, starting with the reading of a recent volume by Giorgio Chiosso, which closely analyzes the most important educational events of the Peninsula.

EET/TEE KEYWORDS: History of pedagogy; History of education; Educational journals; Italy; XIXth-XXth Centuries.

L'ultima fatica editoriale di Giorgio Chiosso ci consegna un ampio e dettagliato affresco di una stagione della storia educativa italiana, quella compresa fra fine '800 e primo trentennio del '900, di indubbia vitalità[1]. Si tratta di un periodo già studiato dai cultori della materia, ma ciò che rende peculiare questo libro è, tra l'altro, lo sforzo di fare dialogare livelli interpretativi diversi, ovvero di tenere conto dei risultati conseguiti dalla ricerca storica-educativa, anche quella più recente, in più ambiti di indagine. La storia del pensiero pedagogico, o forse sarebbe meglio dire della cultura educativa dell'epoca, ripercorsa nei diversi capitoli di cui il saggio si compone è ricostruita partendo non solo dalla più tradizionale analisi delle opere degli autori che presero parte al dibattito di

[1] G. Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, Bologna, il Mulino, 2019.

quel periodo, ma valorizzando anche le più recenti analisi relative alle riviste didattiche e magistrali, all'editoria scolastica, agli insegnanti, alla cultura materiale della scuola.

La disamina prende le mosse dalla presa d'atto della ricorrenza nelle pubblicazioni dei primi del Novecento della denuncia dell'esistenza di due Italie (settentrionale/meridionale; rurale/in via di industrializzazione; animata da sentimenti religiosi/laica; civilizzata/ancora segnata da malattie endemiche, da condizioni di vita precarie e insalubri; fortemente compresa dei principi del positivismo/tenacemente antipositivista) cui corrispondevano, sul piano dell'accesso agli studi, due Italie scolastiche, una connotata da una più regolare frequentazione delle aule e un'altra ancora esclusa dai luoghi del sapere e che ottemperava a fatica alla legge sull'obbligo dell'istruzione. Non si trattava, nota l'Autore, di un'immagine che si limitava a riflettere lo stato delle cose, ma rappresentava «anche un diverso progetto per dare vita a quell'Italia 'una' che, seppur con intenti differenti» era perseguito dai diversi intellettuali e politici dell'epoca[2].

Nello specifico due sono i protagonisti – ovvero Luigi Credaro e Giovanni Gentile destinati a diventare responsabili della Minerva e a segnare la storia scolastica italiana – che si fronteggiarono, con i loro gruppi, le loro imprese editoriali, le loro pubblicazioni, le loro riviste, la loro manualistica per gli insegnanti, portando avanti due diversi disegni di educazione nazionale e di sviluppo del Paese.

Molti sono gli spunti di riflessione che il libro offre e su cui ci si potrebbe soffermare, quali il confronto fra il disegno di riforma della scuola tardo positivista e neokantiano, da un alto, e quello neoidealista di Gentile e Lombardo Radice, dall'altro, l'illustrazione dei fini e delle strategie messe a punto da entrambe le parti al fine di rinnovare il Paese, la sottolineatura della comune volontà di «fare gli italiani» con la precisazione dei differenti e, da alcuni punti di vista, antitetici significati attribuiti dalle due parti a questo obiettivo, comunque avvertito come una vera emergenza educativa.

Compatibilmente con lo spazio a disposizione mi limiterò qui a concentrare l'attenzione su alcuni di questi spunti partendo da una constatazione che Chiosso sottopone al lettore fin dalle prime pagine. Agli inizi del XX secolo, si registrava un significativo avvicendamento nella stampa periodica pedagogica. Nel 1908 cessava di esistere la «Rivista di Filosofia e Scienze Affini», sorta nel 1899 e diretta, negli ultimi anni, da Giovanni Marchesini, che aveva perseguito nel corso della sua vita un progetto di revisione, dall'interno, del positivismo. Unendosi alla «Rivista Filosofica», espressione degli intellettuali neokantiani legati a Carlo Cantoni che ne era anche il direttore, dava vita alla «Rivista di Filosofia», organo della Società Filosofica Italiana, meno attenta però delle due precedenti testate alle questioni educative. In quello stesso anno,

[2] *Ibid*., p. 10.

cioè nel 1908, nasceva la «Rivista Pedagogica» guidata da Credaro, voce degli ambienti pedagogici neokantiani e herbartiani attivi in non pochi Atenei italiani. L'anno prima, nel 1907, aveva invece avviato le pubblicazioni un'altra rivista, destinata a smuovere le acque della cultura educativa nazionale, ovvero i «Nuovi Doveri» di Giuseppe Lombardo Radice. Insomma vedevano la luce, nel giro di pochi mesi, i «primi organici tentativi di creare una pubblicistica pedagogica e scolastica specializzata distinta sia dai periodici filosofici sia dalla stampa magistrale rivolta al mondo professionale degli insegnanti»[3]. Essi erano il segno degli spazi di autonomia e della maturità nella ricerca che la pedagogia veniva conquistando in quel lasso di tempo.

L'analisi dei contributi di queste riviste, condotta dall'Autore attingendo agli articoli pubblicati, alle corrispondenze fra gli studiosi presi in esame, alle loro carte e sulla base della letteratura di riferimento, fa emergere la ricchezza e lo spessore del dibattito del tempo centrato sul modello di Paese che si voleva costruire, sul tipo di scuola che si voleva creare e sulle riforme di cui quest'ultima necessitava agli albori del XX secolo, allorché l'Italia contava ancora circa il 50% di analfabeti.

In proposito merita una particolare menzione il terzo capitolo dal titolo significativo: «Quale maestro per quale nazione?». La domanda, per un verso, origina dalla constatazione che, come esistevano più Italie scolastiche, così vi erano più Italie magistrali (rurale/urbana; maschile/femminile; meridionale/settentrionale) e, per un altro, rinvia a un interrogativo più generale. Si chiede, infatti, Chiosso: «a quali condizioni l'incremento di istruzione era davvero in grado di porre le premesse per una democrazia più ampia? Qual era il senso da attribuire alla lotta contro l'ignoranza: creare cittadini più virtuosi o assicurare una manodopera più preparata? Era sufficiente la liberazione della mente e della coscienza per arrivare alla liberazione sociale e politica oppure i ceti popolari andavano pazientemente accompagnati nella maturazione restando però sostanzialmente confinati in una condizione subalterna?»[4]. È chiaro che il raggiungimento di questi obiettivi così diversi dipendeva fortemente dalla preparazione degli insegnanti elementari e dal tipo di formazione che era loro trasmessa, nonché dal ruolo che era loro affidato. Sui temi qui accennati si sviluppò un ampio dibattito su «Rivista Pedagogica» e su «Nuovi Doveri», questi ultimi sostenuti dal gruppo degli intellettuali antigiolittiani della «Voce», diretta da Giuseppe Prezzolini.

In sintesi, in quell'inizio di secolo, due diversi modi di intendere la funzione della scuola primaria e dei maestri si confrontavano, quella neokantiana-herbertiana di Credaro e quella neoidealista di Gentile, di Lombardo Radice e di Ernesto Codignola. Per Credaro era attraverso la scuola, in specie quella primaria, e la lotta all'analfabetismo che potevano realizzarsi il passaggio

[3] *Ibid*., p. 48.
[4] *Ibid*., p. 92.

dall'Italia rurale a quella industriale, l'avvicinamento del popolo ai valori democratici e il rafforzamento dell'educazione morale tesa a formare cittadini rispettosi dei doveri. Il compito del maestro era quello di contribuire al raggiungimento di questi fini attuando «un insegnamento metodico, rigoroso e efficace, senza fronzoli e anche – osserva Chiosso – […] senza fantasia»[5]. Di qui l'attenzione del politico valtellinese ai maestri, alla loro preparazione, alla riforma della scuola normale, di cui fu uno dei più attivi promotori anche come responsabile della Minerva, non meno che alla tutela della loro professione sul piano giuridico e economico, come documentato dal coinvolgimento in prima persona nella fondazione e nella promozione delle battaglie dell'Unione Magistrale Nazionale agli inizi del Novecento.

L'approccio alla figura dell'insegnante elementare e alla sua preparazione prospettata dal gruppo di studiosi che ruotava attorno a Credaro non teneva però nella dovuta considerazione le prime espressioni italiane di una pedagogia rispettosa della spontaneità infantile. Si comprende allora la stroncatura, ricordata in queste pagine, di Maria Montessori e delle Case dei bambini da parte della «Rivista Pedagogica», che si interessava e informava i lettori delle iniziative avviate dall'educazione nuova anche all'estero, senza però condividerne i princìpi. L'attenzione prevalente al metodo, propria dell'impostazione neokantiana, sfociava nella concezione della pedagogia «come tecnica dell'insegnamento», in linea con il positivismo. «Era invitabile – viene fatto giustamente notare – che ne derivassero distanze difficilmente colmabili rispetto alle esperienze d'avanguardia d'inizio secolo» in ambito educativo[6].

Di diverso segno il progetto politico e educativo neoidealista: condiviso era il fine perseguito di cementare la coesione sociale, ma differenti erano i valori di riferimento e le modalità individuate per realizzarlo. Esso non si fondava sul principio della democrazia, bensì «sull'autorità della tradizione inverata nella Nazione» di Gioberti e di Mazzini. Partendo dalla convinzione che la cultura fosse da intendersi come esperienza spirituale «accomunante anche se vissuta in modi diversi»[7]secondo la concezione neoidealista, il maestro era chiamato a scoprire e valorizzare, anche sul piano didattico, la tradizione popolare locale per portare gli alunni, e più in generale le loro famiglie, a sentirsi parte della medesima identità nazionale, superiore a ogni particolarismo regionale. L'immagine simbolica di questa unità, molto ricorrente nelle pagine dei libri della scuola elementare, era quella dell'Italia come madre accogliente, su cui hanno anche richiamato l'attenzione gli storici interessati allo studio della religione della patria[8].

[5] *Ibid*., p. 94.
[6] *Ibid*., p. 96.
[7] *Ibid*., p. 117.
[8] Si veda, tra gli altri, A.M. Banti, *Sublime madre nostra. La nazione italiana dal Risorgimento al fascismo*, Roma-Bari, Laterza, 2011.

Il popolo era visto come un bambino, perché come quest'ultimo agiva mosso dai sentimenti e dalla spontaneità. Certo il popolo andava dirozzato affinché potesse riconoscersi nella coscienza nazionale e in un destino comune. Tuttavia il progetto dei neoidealisti era diverso da quello di Credaro; questi credeva nella progressiva «emancipazione» dei ceti popolari, i primi invece aderivano all'idea dell'esistenza dei due popoli, di cui si è detto nelle righe precedenti. A loro giudizio stava alla scuola primaria e quindi al maestro il compito di fondere locale/nazionale; identità regionale/identità nazionale; cultura delle élites/cultura popolare. Per questo motivo l'insegnante elementare non doveva essere un abile didatta, ma un intellettuale. Egli era tale se coltivava la propria umanità; il fare scuola era l'esito non dell'applicazione di regole fisse predeterminate, ma di una cultura continuamente rinnovata. La lezione non era il risultato di passaggi fissi, sempre eguali, «ma un'esperienza libera costruita intorno alla concretezza quotidiana e ai suoi problemi […] attenta ai bisogni di ciascun allievo e rispettosa delle consuetudini locali»[9]. È a Giuseppe Lombardo Radice che si deve il merito di avere traghettato la scuola primaria da un'impostazione ottocentesca, tutta centrata sul metodo, a una più attenta alla centralità dell'infanzia destinata però a farsi strada nel nostro Paese con maggiore decisione dal secondo dopoguerra, superato il totalitarismo fascista.

La prospettiva neoidealista e il suo ideale di riforma della scuola, che dagli anni della guerra soprattutto Gentile veniva precisando e facendo conoscere pure al di fuori della ristretta cerchia degli addetti ai lavori attraverso articoli pubblicati sulla stampa periodica nazionale[10] erano destinati a essere condivisi all'indomani del primo conflitto mondiale, in quanto capillarmente diffusa era l'idea, sia pure sostenuta da punti di vista diversi, che occorresse rifondare la nazione e che lo Stato avesse un ruolo importante da questo punto di vista. Il libro opportunamente fa luce su convergenze e divergenze a proposito dell'idea di educazione nazionale, divenuta centrale negli anni tragici della guerra, fra i seguaci di Gentile, da un lato, e quella affermata da altri intellettuali dell'epoca estranei a questa impostazione, quali Giovanni Vidari, o ancora dagli arditi e dai futuristi o dai nazionalisti, dall'altro. È noto poi che alcuni aspetti dell'ipotesi di revisione scolastica avanzata dal gruppo gentiliano ottenevano il consenso anche di ampi settori del mondo cattolico che, fra età giolittiana e primo dopoguerra, avevano rivisto certune rigidità, espressione dell'intransigentismo ottocentesco, circa i rapporti fra Chiesa, famiglia e Stato in merito all'educazione delle giovani generazioni, assumendo posizioni improntate a un maggior pragmatismo, come ben documentato dall'Autore.

[9] Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, cit., p. 126.

[10] Si vedano *Guerra e fede*, *Il problema scolastico del dopoguerra* del 1919 e *Dopo la Vittoria* del 1920.

All'analisi della riforma Gentile, della sua genesi, dei principi fondanti e dei fini, dei suoi rapporti con il fascismo è riservato il penultimo capitolo del libro che, nel mettere a fuoco la complessa materia, si sofferma a illustrare le strategie editoriali attuate in quegli anni dal cenacolo gentiliano nella convinzione che «la battaglia delle idee passasse attraverso libri e riviste e che, pertanto, la penetrazione nelle redazioni costituisse uno snodo strategico» per convincere gli insegnanti, vincere le resistenze del mondo della scuola, coagulare i giovani insoddisfatti delle politiche di riforme dell'età giolittiana[11]. In tale opera si distinsero soprattutto Codignola e Lombardo Radice; ovvero due figure centrali per la riuscita dell'azione di rinnovamento neoidealista della scuola e, più in generale, della pedagogia italiana, ai quali Chiosso dedica belle pagine che fanno luce sulle battaglie condotte in comune, sulle peculiarità dei loro interessi educativi, come pure sul differente atteggiamento da loro assunto in ambito politico circa i rapporti con il fascismo.

Scarsamente incisive in quel contesto di affermazione della dittatura furono le critiche formulate dalla cultura pedagogica laica di ispirazione democratica, che trovarono spazio e visibilità nella già ricordata «Rivista pedagogica» attiva fino al 1939, sia pure fra mille difficoltà, perché Credaro riteneva un suo dovere dal punto di vista etico dare voce al dissenso. L'Autore mette tuttavia in luce come, a fronte di tale fermezza e della consapevolezza, ben presente in alcuni contributi di Francesco De Sarlo e Vincenzo Cento, del pericolo dell'egemonia neoidealista sulla scuola e della identificazione di quella filosofia con una parte politica, ovvero il fascismo, con ricadute importanti sulla negazione della libertà, il prestigioso periodico dimostrasse un approccio debole nella critica alla riforma gentiliana, in quanto incapace di esprimere valide alternative.

L'assetto scolastico che venne così delineandosi in quei decenni era destinato, come è noto, a segnare per qualche decennio ancora, dopo la fine del secondo conflitto mondiale, la nostra scuola e la formazione degli italiani. Va dato merito a Giorgio Chiosso di avere ricostruito con maestria il progressivo strutturarsi di quel sistema e il vivace dibattito in cui prese forma, dando voce a figure di intellettuali, politici e uomini di scuola, alcuni dei quali dimenticati dalla recente ricerca storico-educativa, che con passione e perseveranza fecero della questione scolastica un tema centrale del loro lavoro, nella convinzione che la formazione degli italiani, e quindi la costruzione di un Paese coeso, fosse un ineludibile problema di interesse nazionale.

11 Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, cit., p. 224.

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Il XVIII secolo e le origini della modernità. A proposito di *Settecento pedagogico e riformatore* di Roberto Sani

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The Eighteenth Century and the Origins of Modernity. On Settecento pedagogico e riformatore by Roberto Sani

ABSTRACT: To the light of various and recent historiographic interpretations, the intervention examines the text by Roberto Sani on the pedagogical reflection of the eighteenth century in its various dimensions. Through a broad introduction and specific reading notes, the texts of some of the most significant authors of both the period and the debate on education are presented. A very rich picture emerges, in which the need for a reform of the system is confronted with the political problems of the time. The work offers a convincing interpretation and opens up new research perspectives.

EET/TEE KEYWORDS: History of education; Rousseau; Enlightened absolutism; Ancient Italian States; XVIIIth Century.

Questo volume curato da Roberto Sani – con l'ampia introduzione generale e i puntuali profili di ogni autore e testo presentati – ha il merito di proporre al lettore un dibattito che è all'origine dell'attuale realtà pedagogica e politica, con i caratteri che la definiscono[1]. Anche se ormai ci si trova di fronte ad altri orizzonti e sistemi di pensiero – nel quadro di una *postmodernità* dai confini sfuggenti, tanto più di fronte alla crisi sociale e sanitaria di oggi[2] – resta innegabile che il punto di riferimento da cui partire per una comprensione del presente resta quello del Settecento «pedagogico e riformatore», con i due

[1] R. Sani (ed.), *Settecento pedagogico e riformatore. Scritti di Scipione Maffei, Gasparo Gozzi, Gian Rinaldo Carli, Gaetano Filangieri e Matteo Galdi*. Introduzione e cura di Roberto Sani, Roma, Edizioni Conoscenza, 2019.

[2] Si veda Z. Bauman, *Il disagio della postmodernità*, trad. it., Roma-Bari, Laterza, 2018.

àmbiti dell'educazione e della politica che, riprendendo la lezione di Franco Venturi, vengono qui richiamati in una prospettiva convergente e al tempo stesso ciascuna dotata di una specifica autonomia[3].

Le interpretazioni del secolo XVIII sono, com'è appena il caso di ricordare, molto diverse, alla luce di valutazioni che dalla filosofia politica sono passate alla storiografia, risentendo di giudizi che vanno necessariamente oltre i limiti di un dibattito culturale. Anche per questo l'aspetto pedagogico è rimasto spesso in secondo piano, quasi si tratti del mero sviluppo di un discorso più generale. Il dibattito su Rousseau lo dimostra ampiamente, come ha osservato Giuseppe Bertagna – nell'importante convegno bergamasco del 2012 – smentendo l'idea dell'*Émile* come di un manuale applicato all'educazione di un più vasto progetto politico: non pochi fraintendimenti sul carattere totalitario del pensiero e della stessa pedagogia rousseauiana vanno ricondotti alla frequente confusione fra «ambiti tra loro diversi e che tali, in Rousseau, dovrebbero restare», pur nelle «reciproche interrelazioni»[4]. Fra l'altro la posizione del ginevrino è suscettibile di ricezioni assai differenti, come quella in area austro-tedesca, mediata da Lessing e Kant nonché dalla tradizione filantropica, che ne sottolineava «i tratti liberali e individuali»[5].

Su Rousseau si tornerà più avanti per un'ulteriore considerazione, ma molti fraintendimenti a suo riguardo si possono estendere a ritroso a tutto il Settecento, sempre intorno al rapporto fra dimensione educativa e dimensione politica, con un esito che si è voluto accreditare come liberazione da un passato autoritario e gerarchico o al contrario, ma in realtà limitandosi a rovesciare il segno della lettura, come distruzione di un ordine morale e religioso che andava preservato nei suoi fondamenti. Si tratta di una controversia certo non nuova, che si può far risalire persino all'epoca dei fatti, ma che in campo pedagogico ha portato ad accomunare indebitamente riflessioni teoriche e scelte di politica scolastica anche divergenti. Il *lungo Settecento*, come lo ha definito Carlo Capra, è costituito da aspetti talora eterogenei che, dalla fine della Controriforma all'età napoleonica, hanno costituito la premessa del mondo contemporaneo[6].

Rivisitando con novità di accenti temi a lui cari[7], nel volume da poco pubblicato Roberto Sani mette in luce nell'ampia introduzione la complessità

[3] Il riferimento è a F. Venturi, *Settecento riformatore*, 5 vols., Torino, Einaudi, 1969-1990. Per una recente e puntuale ricostruzione delle interpretazioni del riformismo settecentesco, con un riferimento alla lezione di Venturi, si rinvia a C. Capra, *Introduzione*, in Id., *La felicità per tutti. Figure e temi dell'Illuminismo lombardo*, Roma, Aracne, 2017, pp. 9-23.

[4] G. Bertagna, *Una pedagogia tra metafisica ed etica*, in Id. (ed.), *Il pedagogista Rousseau. Tra metafisica, etica e politica*, Brescia, La Scuola, 2014, pp. 11-66 e in particolare p. 24.

[5] S. Polenghi, *La ricezione di Rousseau in area austro-tedesca. Da Lessing a Milde (1751-1813)*, *ibid*., pp. 215-230 e in particolare p. 217.

[6] Si veda C. Capra, *Gli italiani prima dell'Italia. Un lungo Settecento, dalla fine della Controriforma a Napoleone*, Roma, Carocci, 2014.

[7] Si veda per esempio R. Sani, *L'istruzione nell'età delle Riforme. La riorganizzazione degli studi negli Stati assolutistici del Settecento. Introduzione*, in Id. (ed.), *Educazione e istituzioni*

del Settecento, di cui il riformismo pedagogico, lungi dall'essere l'applicazione di una serie di princìpi generali, rappresenta uno dei momenti centrali[8]. Il terreno che viene scelto è appunto quello concreto, in rapporto innanzitutto ai cambiamenti istituzionali auspicati e spesso realizzati: testi capaci di esprimere «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 dunque vanno letti «in una più larga accezione di "classici" della pedagogia e dell'educazione, specie nella misura in cui costituiscono esempi autorevoli di una progettualità scolastica ed educativa animata e sorretta da una vera e propria "pedagogia civile" e ispirata ai valori e agli ideali dell'età dei Lumi»[9].

Vi è un ulteriore elemento che va qui sottolineato ed è la relazione con i caratteri dell'assolutismo riformatore, proprio perché si tratta di alcune «tra le più rilevanti ed incisive espressioni di quella 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 delle pratiche formative»[10]. Anche in questo caso, la prospettiva è quella di un *lungo Settecento*, che comprende il Triennio rivoluzionario e condiziona gli interventi dei governi napoleonici e della Restaurazione, individuando una linea di continuità sul terreno delle riforme che lega davvero la politica scolastica del XVIII e XIX secolo, come pure quella ecclesiastica e assistenziale. Si tratta, non a caso e in primo luogo, dell'affermazione del dovere dello Stato di svolgere un ruolo attivo e inedito nella vita sociale, da una parte superando antichi particolarismi non più sostenibili e dall'altra promuovendo la «pubblica felicità» e il «benessere» dei sudditi avviati a diventare cittadini, in un quadro coerente di pensiero e azione che da Muratori arriva al cameralismo tedesco e ai protagonisti del riformismo soprattutto asburgico, premessa dei futuri sviluppi. Lo Stato moderno è al tempo stesso un modello di *Wohlfahrtsstaat*, ricercando la propria legittimazione in patto di cittadinanza che ha al centro l'istruzione, l'assistenza, la sanità pubblica[11]. Di questo nuovo patto è garante una religione aperta alla solidarietà: un dise-

scolastiche nell'Italia moderna (secoli XV-XIX). Testi e documenti, Milano, I.S.U. Università Cattolica, 1999, pp. 631-672.

[8] R. Sani, *La «pedagogia civile» nell'età dei Lumi*, in Id. (ed.), *Settecento pedagogico e riformatore*, cit., pp. 7-65.

[9] *Ibid*., p. 8.

[10] *Ibid*., p. 10. Sull'importanza di queste relazioni, si veda R. Sani, *Storia dell'educazione e delle istituzioni scolastiche nell'Italia moderna*, Milano, FrancoAngeli, 2015, pp. 259-301.

[11] Si veda M. Bazzoli, *Il pensiero politico dell'assolutismo illuminato*, Firenze, La Nuova Italia, 1986.

gno certo di segno fortemente giurisdizionalista, ravvisabile dalle legislazioni settecentesche a quelle napoleoniche[12], con importanti ricadute su quelle della Restaurazione[13], ma che anche per questo non avrebbe impedito la rinascita ottocentesca della carità cattolica, per opera di nuove forme di vita consacrata e di associazionismo laico, come dimostra il caso forse più emblematico, quello di Milano e delle terre lombarde, già indagato da Roberto Sani[14].

Autori e testi riflettono bene questi intendimenti, al di là dell'adozione da parte dei sovrani dei provvedimenti suggeriti, come nel caso del *Parere sul migliore ordinamento della Regia Università di Torino*, inviato nel 1718 da Scipione Maffei al re Vittorio Amedeo II. Pur nel mancato accoglimento, il *Parere* si segnala per una decisa apertura, già da lui prospettata in precedenza per l'Università di Padova, a una filologia modernamente intesa, alle scienze storiche e alle discipline scientifiche, al di fuori del «giogo» della tradizione aristotelica[15].

Mezzo secolo più tardi, nel 1770, è di nuovo un'ampiezza di vedute a caratterizzare lo scritto *Sulla riforma degli studj*, in vista del riordinamento dei Collegi per l'istruzione della gioventù di Gaspare Gozzi, commissionata dai Riformatori dello Studio di Padova. Si tratta di un testo che, pur con la prudenza dettata dalla volontà di non urtare la sensibilità conservatrice del patriziato, riflette le acquisizioni della pedagogia settecentesca sull'educazione dei fanciulli, sottolineando il necessario rispetto della loro personalità, l'esigenza di non addossare loro un carico eccessivo di nozioni e un insegnamento troppo precoce ed esclusivamente grammaticale del latino, la necessità di insistere soprattutto sullo studio della lingua italiana. Il corso di Umanità avrebbe dovuto avvalersi di tavole cronologiche e carte geografiche, con molti riferimenti all'esperienza concreta, mentre quello di Retorica avrebbe dovuto mettere al centro dei

12 Si vedano, in una vasta storiografia, H. Raab, Staaatskirchentum *e illuminismo nei territori dell'impero a governo laico. Teresianismo e giuseppinismo*, in *La Chiesa nell'epoca dell'assolutismo e dell'illuminismo. Egemonia francese-Giansenismo-Missioni (XVII-XVIII sec.)*. Prefazione all'edizione italiana Massimo Marcocchi (*Storia della Chiesa* diretta da Hubert Jedin, VII), Milano, Jaca Book, 1978, pp. 543-567; E. Garms-Cornides, *Roma e Vienna nell'età delle riforme*, in F. Citterio, L. Vaccaro (edd.), *Storia religiosa dell'Austria*, Milano, Centro Ambrosiano, 1997, pp. 313-340; F. Agostini, *La riforma napoleonica della Chiesa nella Repubblica e nel Regno d'Italia 1802-1814*, Vicenza, Istituto per le ricerche di storia sociale e religiosa, 1990; I. Pederzani, *Un Ministero per il culto. Giovanni Bovara e la riforma della Chiesa in età napoleonica*, Milano, FrancoAngeli, 2002.

13 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; sul giuseppinismo della Restaurazione cfr. M. Pippione, *L'età di Gairsuck*, Milano, NED, 1984.

14 Cfr. R. Sani (ed.), *Chiesa, educazione e società nella Lombardia del primo Ottocento. Gli Istituti religiosi tra impegno educativo e nuove forme di apostolato (1815-1860)*, Milano, Centro Ambrosiano, 1996; cfr. anche M. Bona Castellotti, E. Bressan, C. Fornasieri, P. Vismara (edd.), *Cultura, religione e trasformazione sociale. Milano e la Lombardia dalle riforme all'unità*, Milano, FrancoAngeli, 2001.

15 S. Maffei, *Parere sul migliore ordinamento della Regia Università di Torino (1718)*, in Sani (ed.), *Settecento pedagogico e riformatore*, cit., pp. 79-89 (e si vedano *La vita e le opere* e l'*Introduzione al testo*, *ibid*., pp. 68-73 e pp. 79-89).

programmi matematica, filosofia, economia. Un'attenzione particolare è infine riservata alle *Scuole de' Sestieri*, da rilanciare per farne la base di un sistema d'istruzione elementare e popolare[16].

Di poco successivo, del 1774, è il testo fondamentale di Gian Rinaldo Carli, *Nuovo metodo per le scuole pubbliche d'Italia*, elaborato nel vivo dei dibattiti della Milano dei Lumi, in cui l'autore, originario di Capodistria, svolge un ruolo di primo piano – giustamente famoso è l'articolo *La patria degli italiani*, pubblicato su «Il Caffè», che denuncia un diffuso e inutile campanilismo, tanto più nel campo degli studi – per poi assumere prestigiosi incarichi politici. Riprendendo in parte le proposte formulate l'anno precedente da Giuseppe Gorani, Carli formula un organico progetto di scuola pubblica sotto il controllo dello Stato per i diversi gradi d'istruzione, per rimediare alla decadenza degli studi nella penisola che era sotto gli occhi di tutti. Si tratta di una prospettiva all'interno del suo riformismo moderato – che lo avrebbe poi portato ad allontanarsi dal radicalismo giuseppino – ma che appare di grande importanza nel sottolineare come solo un *sistema ragionato degli studi*, comprendente anche quelli ecclesiastici, potesse rappresentare la premessa di un ordinato progresso civile[17].

È sulla base di questi elementi che si costruisce una scuola aperta a tutti, dal grado elementare a quello secondario, fattore decisivo per la formazione dei giovani, di cui lo Stato è chiamato a essere garante e promotore. Tale prospettiva è al centro della riflessione di Gaetano Filangieri, di cui si riporta una parte fra le più significative del IV libro della *Scienza della legislazione* (*Delle leggi che riguardano l'educazione, i costumi e l'istruzione pubblica*) del 1780. Sia per coloro che compiono il primo ciclo – dai sei ai diciotto anni, totalmente a carico dello Stato e sotto il controllo delle magistrature provinciali – sia per chi prosegue negli studi universitari, si delinea finalmente la centralità della scuola nella vita sociale e si configura un sistema di «educazione pubblica»[18]. Il «sistema dell'educazione pubblica» dei «moderni», come lo definisce Filangieri, non può prescindere dal carattere dell'«universalità» proprio in vista del suo fine, quello di suscitare negli allievi «l'amore della società e la pratica cognizione della reciproca dipendenza del genere umano»[19].

16 G. Gozzi, *Sulla riforma degli studj (1770)*, in Sani (ed.), *Settecento pedagogico e riformatore*, cit., pp. 79-89 (e si vedano *La vita e le opere* e l'*Introduzione al testo*, *ibid*., pp. 92-95 e pp. 105-119).

17 G.R. Carli, *Nuovo metodo per le scuole pubbliche d'Italia (1774)*, in Sani (ed.), *Settecento pedagogico e riformatore*, cit., pp. 133-146 (e si vedano *La vita e le opere* e l'*Introduzione al testo*, *ibid*., pp. 122-127 e pp. 128-131). Per l'importanza e il carattere innovativo del dibattito lombardo in proposito, cfr. Capra, *Gli italiani prima dell'Italia*, cit., pp. 257-260.

18 G. Filangieri, *Delle leggi che riguardano l'educazione, i costumi e l'istruzione pubblica (1780)*, in Sani (ed.), *Settecento pedagogico e riformatore*, cit., pp. 159-185 (e si vedano *La vita e le opere* e l'*Introduzione al testo*, *ibid*., pp. 148-152 e pp. 153-157).

19 Filangieri, *Delle leggi che riguardano l'educazione, i costumi e l'istruzione pubblica (1780)*, *ibid*., pp. 162-163.

È interessante notare come idee di questo genere abbiano poi trovato accoglienza nella visione di Matteo Galdi, figura di primo piano del Triennio rivoluzionario e poi del Regno di Napoli di Gioacchino Murat, come pure della prima Restaurazione, quando avrebbe ricoperto cariche importanti anche nel campo dell'istruzione pubblica. Lo scritto qui presentato, il *Saggio d'istruzione pubblica rivoluzionaria*, appartiene al momento giacobino del suo pensiero e della sua azione, delineando un sistema finalizzato all'educazione democratica, con i «catechismi repubblicani», le «feste decadarie», i «teatri patriottici», in vista di un «apostolato repubblicano» che ha come modello la Francia del 1793 sotto la guida di Robespierre[20]. Ci si trova di fronte a una posizione segnata da evidente radicalismo, che l'autore stesso avrebbe superato, ma che rappresenta, da un lato, l'espressione di un momento irripetibile come quello degli infuocati dibattiti nella Milano capitale della Cisalpina e, dall'altro, un esito in qualche modo estremo di posizioni politiche e pedagogiche maturate nel corso del secolo.

L'approdo in chiave rivoluzionaria del dibattito settecentesco è stato associato – anche se in maniera discutibile, come si è visto – alla figura di Rousseau. Testi e autori ripresi da Sani mostrano però l'ambiguità di una lettura che li consideri quali precursori di una mèta già segnata, quella di un rivolgimento politico totale e di un'educazione rivolta a cancellare le tracce del passato. In realtà il riformismo illuministico qui preso in considerazione si misura con i problemi concreti degli ordinamenti scolastici e universitari, dell'organizzazione degli studi e dei loro contenuti, del rapporto fra educazione e progresso della società, della necessità dell'intervento pubblico. Si potrebbe aggiungere che emerge persino una riserva nei confronti di teorie tanto generali quanto palingenetiche, come forse può suggerire la critica di Filangieri nei confronti di Rousseau, al quale è comunque debitore per diversi aspetti, critica che verte non a caso sul carattere sociale di ogni modello di formazione[21]. La riflessione pedagogica dell'età delle Riforme va appunto restituita, come si fa in queste pagine, all'esigenza di aprire vie nuove in un continuo rapporto con la storia e con la società: da questo incessante confronto nasce la modernità di proposte destinate a segnare il futuro dell'educazione.

[20] M. Galdi, *Saggio d'istruzione pubblica rivoluzionaria (1798)*, in Sani (ed.), *Settecento pedagogico e riformatore*, cit., pp. 199-218 (e si vedano *La vita e le opere* e l'*Introduzione al testo*, *ibid*., pp. 188-191 e pp. 192-197).

[21] Si veda la nota 18.

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L'istruzione difende la libertà. Riflessioni sui percorsi educativi delle donne in Albania tra XIX e XX secolo

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Education defends freedom. Reflections on women's educational paths in Albania between the XIXth and XXth Centuries

ABSTRACT: The paper is intended to offer a critical view of the recent book by Vittoria Bosna entitled, *La mano che muove la culla del bambino è quella che comanda il mondo. I percorsi educative delle donne in Albania tra XIX e XX secolo*. The work, starting from the Albanian history in 19th-20th Centuries, aims to look into two issues: the creation of Albanian national identity and the education for everyone. The article focuses on the figure of Qiriazi sisters as a pioneers of education. Their work allowed the woman's emancipation to improve their training in the school and their role in the society going further the feature of woman trapped into domestic walls. The paper, starting from the pedagogical ideas of Qiriazi sisters, explores the connection between education, school and society.

EET/TEE KEYWORDS: History of school; History of Albanian pedagogy; Female empowerment; Education and society; Albania; XIXth-XXth Centuries.

La storia di ogni popolo è una storia di infinite possibilità: è attraverso le esperienze, le lotte, gli incontri, le esplorazioni, le difficoltà vissute nel corso degli anni che ogni civiltà riesce a costruire una propria immagine e ad identificarsi all'interno di un *habitus* che ne diviene distintivo. La creazione di una comunità entro la quale riconoscersi è frutto di un processo di negoziazione basato sulla relazione in cui gli individui costruiscono attivamente un terreno comune fatto di valori, credenze, rappresentazioni, simboli, linguaggi che hanno la potenza di costituirsi quali tratti distintivi e costitutivi di ogni persona aderente a quello specifico gruppo. La comunità, pertanto, è capace, non solo, di riconoscersi, arricchirsi e crescere all'interno di un proprio *telos* condiviso ma è anche capace di riconoscersi quale trasmettitore di tale bagaglio all'esterno dei propri confini territoriali. Ogni popolo condensa i propri riferimenti valoriali

e culturali nella creazione di simboli: rappresentazioni dall'alto tasso evocativo che hanno la capacità di richiamare, nella datità del loro manifestarsi, i tratti costitutivi della comunità in oggetto[1]. Dunque, la storia di ogni popolo è una storia di cura: delle relazioni, delle persone e delle narrazioni; ma è anche una storia che necessita di scriversi e ri-scriversi affondando le proprie radici nei racconti e nelle testimonianze degli antenati e traendo nutrimento dagli spazi di partecipazione, condivisione e costruzione del tempo e dello spazio della vita-in-comune. La comunità dunque è anche soggetto capace di educare e catalizzare processi formativi e di apprendimento volti al ben-essere del singolo e della collettività; ma è anche un'entità che necessita di attivare su se stessa processi di riflessione e meta-riflessione che le consentano di progredire nella direzione della crescita, del progresso e della soddisfazione dei bisogni dei propri membri. Parafrasando l'*I care* di don Milani, si tratta di avere a cuore il presente ed il futuro della propria comunità in un circolo virtuoso che sappia raccordare insieme i processi educativi, l'ambiente e lo sviluppo sociale. Secondo John Dewey, uno dei pedagogisti di spicco del movimento per l'educazione nuova, è proprio l'esperienza all'interno dell'ambiente sociale che favorisce lo sviluppo della persona e della comunità: la formazione più profonda «avviene inconsciamente, a man mano che i giovani partecipino gradualmente alle attività dei vari gruppi ai quali appartengono»[2]. Tuttavia, nel corso della storia, il complessificarsi della società ha richiesto la strutturazione di luoghi adibiti alla formazione e all'apprendimento che sappiano istituzionalmente dare vigore al sapere e formare cittadine e cittadini consapevoli e responsabili. Spetta alla scuola il compito di raccordare tali necessità come luogo ed istituzione sociale capace di produrre e valorizzare le conoscenze, di porsi come agenzia educativa nei territori e di istituirsi come baluardo di una storia che ha bisogno di essere protetta, ricordata ed attualizzata nel presente per espletare la propria funzione culturale. Se la storia è davvero una maestra di vita, come scrive Cicerone nel *de Oratore*, è necessario che la scuola si configuri come spazio partecipativo entro il quale tematizzare il passato, il presente ed il futuro della comunità per renderli utili alla società. Le questioni fin ora trattate rappresentano, nella mia opinione, gli occhiali con i quali guardare il complesso quanto straordinario percorso compiuto dalla popolazione albanese tra il XIX ed il XX secolo allorché si fece urgente la necessità umana di costruire una propria identità culturale nazionale. Il lavoro di ricerca di Vittoria Bosna[3] ricostruisce in modo egregio le fatiche di un popolo che ha cercato di affermare la propria democratica indipendenza smarcandosi dalle dominazioni attraverso la potenza generativa

[1] Cfr. G. d'Elia, *Conoscersi, Intercettarsi, Ri-Conoscersi*, «Pedagogia e Vita», vol. LXXVIII, n. 1, 2020, pp. 45-51.

[2] J. Dewey, *Democrazia e educazione*, Firenze, La Nuova Italia, 1966 p. 31.

[3] Si faccia riferimento al testo di V. Bosna, *La mano che muove la culla del bambino è quella che comanda il mondo. I Percorsi educativi delle donne in Albania tra XIX e XX secolo*, Roma, Aracne, 2019.

della partecipazione alla vita ed ai processi della comunità ed attraverso una istruzione per tutti che distrugga l'ingeneroso ruolo nel quale la donna era stata confinata per troppo tempo. È attraverso l'impegno sociale e politico delle sorelle Qiriazi che emerge la figura di una donna capace di pensare e progettare il mondo, non sottoposta e succube dell'uomo ma capace di creare sinergie, visioni e possibilità di emancipazione e progresso. Le mie riflessioni dunque mirano ad indagare due questioni che ritengo estremamente attuali e cariche di significato: il rapporto tra scuola e società e la necessità di un'istruzione per tutti.

1. *Scuola e società: un percorso verso la creazione di una identità culturale*

Il percorso di cambiamento cominciò con il periodo risorgimentale dando impulso e vigore ad un nuovo modo di intendere e vivere la società: creare una dimensione educativa e politica che fosse capace di valorizzare la persona nel suo esercizio di autodeterminazione e di libertà. Il percorso del popolo albanese partì proprio dal profondo desiderio di reclamare la propria autonomia e indipendenza liberandosi dal giogo delle dominazioni che per anni avevano occupato il territorio balcanico. Una dominazione non solo fisica, ma anche culturale: era dunque necessario, per il Paese delle aquile, riconquistare ed affermare la propria identità nazionale[4]. L'antico episodio biblico della distruzione della Torre di Babele pone a mio avviso in rilievo due aspetti che ben si intrecciano con la questione albanese: la lingua come fattore di identità socio-culturale e come mezzo di comunicazione. L'obiettivo degli intellettuali albanesi fu proprio quello di lavorare affinché si creassero un alfabeto ed una lingua nazionali: «la scuola avrebbe fatto il resto, nel senso che avrebbe formato albanesi che parlavano la loro lingua, diminuendo il forte impatto esercitato dell'educazione straniera»[5]. Tutto il progetto si fondava dunque sulla creazione dell'identità comunicativa quale fattore primordiale di una comunità capace di stare insieme, comprendersi e costruire progetti. La scuola è dunque il luogo dove poter dare respiro e valore alla costruzione di questo processo identitario nella misura in cui si pone come presidio democratico nel territorio e come spazio di partecipazione e confronto per la crescita di ogni cittadino. Tutto il percorso di autodeterminazione della cultura albanese attinge nel suo farsi all'atmosfera sociale, politica e pedagogica dell'epoca fortemente influenzata a livello internazionale dalle ricerche di Maria Montessori e di John Dewey[6]. Quest'ultimo, nel complesso lavoro di riflessione pedagogica inerente

[4] *Ibid*., pp. 15-20.
[5] *Ibid*., pp. 22-23.
[6] *Ibid*., p. 70.

al rapporto tra educazione, scuola e società, a conclusione del primo capitolo di *Democrazia e educazione* (1916) scrive che «natura della vita è quella di continuare a esistere. Poiché questa continuazione può essere assicurata solo con costanti rinnovamenti, la vita è un processo di auto-rinnovamento. Ciò che la nutrizione e la riproduzione sono per la vita fisiologica, l'educazione lo è per la vita sociale. Questa educazione consiste principalmente nella trasmissione per mezzo della comunicazione. La comunicazione è un processo con cui si partecipa all'esperienza finché essa diventa un patrimonio comune»[7]. Dewey sottolinea come l'esperienza nell'ambiente insieme alla comunità di riferimento è un fattore alla base dei processi di sviluppo dei giovani e di ogni società: concorre alla formazione della persona, promuove lo sviluppo di un pensiero e di un agire collaborativo e cooperativo e garantisce la creazione di uno spirito morale ed un senso di appartenenza. Dunque, non solo la necessità di fare della pedagogia una scienza che guarda e che vive nell'esperienza, ma anche l'importanza di leggere la pedagogia come un sapere capace di rileggere le esperienze per farle proprie e risignificarle e come un pensiero che guardi all'educazione come ad un processo sociale nel suo costante riferimento e rimando alla realtà. Tali questioni trovano una concretizzazione importante in tutto il lavoro che un gruppo di patrioti avviò nel 1879 quando fondò ad Istanbul la Società per la stampa dell'alfabeto albanese col chiaro intento di dare vigore alla cultura nazionale attraverso la pubblicazione di libri e giornali[8]. Le pubblicazioni patriottiche costituirono un punto fermo nel percorso di affermazione albanese atto a far comprendere a tutti quanto fosse fondamentale avere una propria lingua da custodire e trasmettere. Tali processi ebbero grandi ripercussioni anche nella scuola, attraverso il lavoro instancabile delle sorelle Qiriazi che lavorarono nel segno della promozione di un'istruzione per tutti in cui i giovani potessero non solo conoscere la storia del proprio paese ma anche quella delle altre nazioni in modo da favorire il progresso e lo sviluppo della propria società. Romanzi, poesie, opere artistiche costituiscono un bene prezioso che la scuola ha il compito di valorizzare in quanto capaci non solo di raccontare il passato di una civiltà ma anche di affermare i valori, gli ideali e le visioni del mondo di una cultura che è riuscita con fatica e determinazione a costruirsi nel corso della storia. Come sottolinea Parashqevi Qiriazi «la storia della pedagogia ci insegna […] che l'istruzione non ha come obiettivo ultimo insegnare dei semplici fatti della vita, ma sviluppare intrinseche attitudini capaci di farli propri questi fatti. […] Con semplici parole l'istruzione è applicazione e […] l'insegnante deve ricordare di trovare sempre un'associazione tra l'ambiente sociale e quello scolastico»[9].

[7] Dewey, *Democrazia e educazione*, cit., p. 12.

[8] Cfr. Bosna, *La mano che muove la culla del bambino è quella che comanda il mondo. I Percorsi educativi delle donne in Albania tra XIX e XX secolo*, cit., p. 82.

[9] Sh. Osmani, *Trashëgimi social-pedagogjike (Motrat Qiriazi), Enti i Teksteve dhe i Mjeteve Mësimore i Kosovës*, Prishtinë, 1997, pp. 153-154.

2. *Il lavoro pioneristico delle sorelle Qiriazi: la «scuola delle ragazze»*

Nel panorama albanese le sorelle Sevasti e Parashqevi Qiriazi rappresentano la forza travolgente di due donne che sono state capaci di rivoluzionare non solo l'impianto pedagogico ed educativo della loro terra e l'istituzione scolastica ma hanno anche contribuito con determinazione, tenacia ed altissimi ideali a liberare le donne da una cultura che le voleva imprigionate tra le mura domestiche. Le sorelle Qiriazi donne di cultura e di animo sensibile, come è raccontato con rispettoso trasporto nel lavoro di ricerca di Bosna, hanno inseguito per tutta la loro esistenza la realizzazione di un Albania diversa: democratica, progressista ed emancipata. Il loro impegno, politico e sociale allo stesso tempo, si è scontrato contro una parte negletta e conservatrice della società e contro una classe politica non sempre disposta all'ascolto ed al confronto. Ritengo che nel lungo percorso condotto dalle sorelle due possano essere considerati i traguardi di maggior successo e che hanno contribuito alla ridefinizione dell'atmosfera culturale albanese tra il XIX e il XX secolo: la fondazione della prima scuola femminile nel 1891 e la fondazione dell'associazione femminile «La stella del mattino» nel 1909[10]. La scuola delle ragazze si configurò come un vero e proprio luogo di formazione nazionale dove donne di ogni ceto e religione avevano la possibilità di istruirsi e crescere con la duplice finalità di poter fornire ai propri figli una preparazione sempre più di qualità e di auspicare ad un ingresso nel modo del lavoro, mondo dal quale sino a quel momento erano state escluse. Era una scuola capace di distruggere il fanatismo che calpestava la loro dignità e le imprigionava nel buio dell'ignoranza dimostrando come fosse assolutamente inaccettabile che «la donna non aveva bisogno dell'istruzione e non aveva nessun valore nella costruzione della nazione»[11]. Nei sogni e nell'impegno delle sorelle Qiriazi emerge la figura di una donna emancipata ed indipendente capace di vivere il proprio presente e di costruire il proprio futuro. Emerge, inoltre, la volontà di aprire gli spazi del confronto politico e sociale al mondo femminile capace con la propria sensibilità e le proprie conoscenze di contribuire al cambiamento ed al miglioramento della società. L'impegno delle sorelle Qiriazi in tal direzione, spesso contrastato e cesurato dalle opposizioni politiche, ebbe grandi riconoscimenti anche fuori dal territorio nazionale tanto che l'ufficiale delle autorità turche in vista presso l'istituto delle ragazze affermò che «se questa scuola continua ad istruire con tale etica e in maniera così esemplare, […] allora vi dico di lasciarla fiorire e progredire. Io desidero che si evolva e per questo la proteggerò»[12]. La scuola delle ragazze era un luogo di cura, un

[10] Cfr. Bosna, *La mano che muove la culla del bambino è quella che comanda il mondo. I Percorsi educativi delle donne in Albania tra XIX e XX secolo*, cit., p. 18.

[11] *Ibid*., p. 38.

[12] *Ibid*., p. 58.

luogo di formazione e un luogo in cui far germogliare le doti del cuore, quelle doti che guardano alla relazione educativa come tratto fondante, costitutivo ed imprescindibile di ogni azione pedagogica. Difatti, le sorelle Qiriazi insistettero parecchio sulla formazione degli educatori in quanto avevano il compito non solo di formare le nuove generazioni ma di avere uno sguardo capace di leggere la realtà intorno, compresa quella trans-nazionale, per farne un'acuta analisi ed una proficua progettazione nel segno del cambiamento positivo e del benessere del popolo. La scuola sognata e realizzata dalle due sorelle era una scuola per tutti, una scuola che non faceva distinzioni di classe o di religione ed una scuola attenta anche ai bisogni dei più fragili, di coloro che sino a quel momento erano stati esclusi da ogni processo formativo istituzionalizzato. Nella scuola delle sorelle Qiriazi c'era anche spazio per la disabilità affinché ogni persona, nel pieno rispetto della sua umanità, avesse l'opportunità di aprire la propria mente ed accostarsi ai tesori del sapere. La scuola e l'istruzione non dovevano dunque essere date per scontato ma dovevano costituirsi quale forte stimolo per condurre la persona alla sua piena realizzabilità in un contesto albanese profondamente mutato: aperto e democratico. Il pensiero pedagogico delle sorelle Qiriazi era in assoluta linea con il pensiero pedagogico a loro contemporaneo fondato sul pieno riconoscimento della persona e delle proprie facoltà cognitive ed emotive: numerosi sono anche i riferimenti a Machie, Brown, Stochton e ad i classici autori quali Rousseau, Frobel, Pestalozzi, Komensky[13]. Il lavoro delle sorelle Qiriazi è un vero e proprio progetto pioneristico che ha saputo coniugare teoria e pratica, razionalità ed emozione, concretezza ed utopia. «Lo scopo primo e vero dell'istruzione – affermavano le Qiriazi – non è di darvi conoscenze straordinarie, ma di farvi coltivare le risorse interiori e di costruirvi valori universali. In sintesi, lo scopo dell'istruzione è di prepararvi a vivere con dignità e utilità la nostra vita»[14].

3. *L'istruzione difende la libertà*

«La mano che muove la culla del bambino è quella che comanda il mondo» scrive Vittoria Bosna, come titolo del suo lavoro di ricerca; un titolo potente, capace di richiamare immediatamente il potere generativo e trasformativo dell'educazione. Un potere che ha la capacità sia di perseguire la piena realizzabilità della persona, sia di tramutare nel segno della positività le esperienze che la vita ci offre. La mano che muove la culla è una mano attenta, delicata, protettiva, è una mano che ha cura dei suoi figli e del mondo che

[13] *Ibid*., p. 76.

[14] Cfr. Osmani, *Trashëgimi social-pedagogjike (Motrat Qiriazi), Enti i Teksteve dhe i Mjeteve Mësimore i Kosovës*, cit., pp. 149-152.

abitano. La mano che muove la culla è una mano che fa della cura un'attenzione imprescindibile per costruire un mondo che sappia costruire bellezza e generare stupore. La mano che muove la culla è una mano che guarda con fiducia e con speranza al futuro attraverso un impegno costante ed appassionato nel presente. Papa Francesco durante l'omelia per l'inizio del Ministero Petrino (2013) affermò che «la vocazione del custodire non riguarda solo i cristiani, ha una dimensione che precede e che è semplicemente umana, riguarda tutti. […] È il custodire la gente, l'aver cura di tutti, di ogni persona, con amore, specialmente dei bambini, dei vecchi, di coloro che sono più fragili e che spesso sono nella periferia del nostro cuore». La bellezza della storia dell'educazione è quella di farsi carico di questa custodia, di preservarla e di risignificarla in tempi e spazi anche diversi ravvivando la memoria e producendo azioni generative e potenzialmente cariche. L'impegno alla cura delle sorelle Qiriazi può allora essere riletto alla luce dell'oggi dando respiro ad una pedagogia che dia rilievo al concetto della "cura". Cura delle persone per valorizzarle nella loro diversità e nella preziosità dei loro progetti; cura della storia per dare vigore alla memoria e a tutte quelle narrazioni che sono custodite nelle fonti primarie ma anche negli scorci della quotidianità; cura degli spazi e dei tempi per costruire forme partecipative e farsi promotori dell'ambiente che abitiamo. Cura, infine, della scuola come baluardo del pensiero, della libertà e della formazione; come luogo della formazione, della crescita e della cooperazione; come spazio di democrazia e di condivisione del potere trasformativo tra generazioni; come spazio delle infinite possibilità che ha la capacità di costruirsi e ri-costruirsi germogliando anche nelle difficoltà. L'impegno delle sorelle Qiriazi ha posto un seme nel cuore di ogni cittadino fiduciose che l'istruzione avrebbe reso libere e liberi ogni donna ed ogni uomo dal giogo dell'ignoranza e dell'arretratezza. Credere ancora oggi nel potere trasformativo e generativo della scuola significa allora credere che anche sul terreno più impervio il seme possa germogliare. È in questo passaggio che l'attenzione alla custodia si tramuta in azione ed in impegno costituendosi quale tratto imprescindibile di ogni azione intenzionalmente educativa: «A che serve avere le mani pulite se si tengono in tasca? Ecco, occupatele» (don Lorenzo Milani).

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Marxismo e femminismo: una questione educativa?

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Marxism and feminism: an educational question?

ABSTRACT: This contribution addresses the complex issue of the relationship between Marxist thinking and the topic of women's emancipation. It analyses particularly the considerations made by Karl Marx and Friedrich Engels starting from the Communist Party Manifesto (1848) and in other texts, where the report of exploitation in female masses' work is linked to a critique of the bourgeois conception of the relationship between man and woman, declined in terms of domination and possession. At the same time it refers to the complex and troubled relationship between 20th century feminism and Marxist thought, to the acute critical observations made by Simone De Beauvoir and also to the Marxist-inspired theses elaborated by Kate Millet and, later, by Nancy Fraser. It is considered a rich issue, relating to historical-educational values, as is shown by the epistolary testimonies of Karl Marx's family life.

ETT/TEE KEYWORDS: Marxism; Feminism; Gender Inequality; Marx House; History of education; XIXth Century.

Marxismo e femminismo

Nell'affrontare il tema del rapporto fra il marxismo e la questione dell'emancipazione e della liberazione delle donne appare subito evidente la vastità dell'argomento. Esso è connesso, infatti, a molti aspetti, che chiamano in causa una pluralità di dimensioni fra di loro interconnesse di tipo economico, antropologico, politico ed anche storico-educativo.

Inizio con una citazione apparentemente impropria, tratta dal testo di Karl Marx, *Manoscritti economici-filosofici del 1844*, e relativa alla critica dell'uso della teodicea come spiegazione del mondo:

Un essere si considera indipendente soltanto quando è padrone di sé, ed è padrone di sé soltanto quando è debitore a se stesso della propria *esistenza*. Un uomo che vive della grazia

altrui si considera come un essere dipendente. Ma io vivo completamente della grazia altrui, quando sono debitore verso l'altro non soltanto del sostentamento della mia vita, ma anche quando questi ha oltre a ciò *creato la mia vita*, è la *fonte della mia vita*; e la mia vita ha necessariamente un tale fondamento fuori di sé quando non è la mia propria creazione[1].

La critica di Marx al fondamento teologico della storia può assurgere, a mio avviso, a metafora del rapporto uomo-donna. Si può, infatti, affermare che se è vero che Dio *creò* l'uomo, a lungo poi l'uomo *educò* la donna imponendo al genere femminile codici prescrittivi e angusti confini identitari[2].

La collocazione del genere femminile in un sistema, che chiameremo per semplificare patriarcale, ha reso a lungo impossibile per le donne, sottoposte a vincoli di genere e, contestualmente, a condizionamenti derivanti dall'appartenenza ad una classe sociale, auto rappresentarsi e determinare autonomamente la loro stessa soggettività.

Ed erano proprio pochi i diritti delle donne al tempo di Marx (e ancora oggi in molte parti del mondo), come le prime emancipazioniste, a partire dal secondo Ottocento, ebbero il coraggio di denunciare (si pensi, ad esempio, in Italia, ad Anna Maria Mozzoni)[3]: escluse dal voto, prive di ogni più elementare tutela (dalla salute alla maternità) costrette a turni di lavoro massacranti se operaie o contadine, poco alfabetizzate e allontanate dagli studi superiori (in alcuni Paesi per legge), soggette alla patria potestà e all'istituto dell'autorizzazione maritale, impedite a testimoniare negli atti pubblici perché la loro parola era giuridicamente priva di fede e inattendibile; se borghesi chiuse in una prigione dorata che le escludeva dallo spazio pubblico (si pensi, ad esempio, alla magistrale rappresentazione di una condizione di prigionia non solo simbolica presente in *Casa di bambola* di Ibsen del 1879)[4]. Alla fragilità delle loro fibre fisiche e nervose ci si appellò a lungo per escluderle dalle professioni più elevate[5].

Proprio per questo, la retorica della *mistica della femminilità* – felice espressione coniata nel 1963 da Betty Friedan, una delle più significative

[1] K. Marx, *Öekonomisch-philosophische Manuskripte aus dem Jahre 1844* in V. Adoratski (ed.), *Marx, Engels Gesamtausgabe*, Abtelung 1, Band 3, Frankfurt a. M., Marx-Engels-Archiv-Verlagsgegesellchaft 1932, pp. 29-173; tr.it., *Manoscritti economico-filosofici del 1844*, Torino, Einaudi, 1949, p. 123.

[2] Cfr., a questo proposito, C. Covato, M.C. Leuzzi (edd.), *E l'uomo educò la donna*, Roma, Editori Riuniti, 1989.

[3] Cfr. A.M. Mozzoni, *La donna e i suoi rapporti sociali* Milano, Tipografia sociale, 1864. Sul tema, vedi anche, F. Pieroni Bortolotti, *Socialismo e questione femminile in Italia* (1892-1922), Milano, Mazzotta, 1974; F. Taricone, B. Pisa (edd.), *Operaie, borghesi, contadine nel XIX secolo*, Roma, Carucci, 1986; G. Duby, M. Perrot (edd.), *Storia delle donne. L'Ottocento*, a cura di G. Fraisse, M. Perrot, Roma-Bari, Laterza, 1996.

[4] H. Ibsen, *Et Dukkehjem* København, Gyldenfalske Boghandels Forlag 1879. Per un approfondimento del tema, cfr. F. Borruso, *Donne immaginarie e destini educativi, Intrecci educativi nel teatro di Ibsen, Čechov e Strinberg*, Milano, Unicopli, 2008.

[5] Cfr., a questo proposito, A. Galoppini, *Il lungo viaggio verso la parità*, Pisa, Tacchi Editori, 1980.

teoriche del movimento femminista sviluppatosi fra gli anni Sessanta e gli anni Settanta del Novecento negli Stati Uniti – rappresenta un palese inganno e ha avuto come fine perverso quello di sublimare la subalternità e l'obiettiva condizione di discriminazione non solo salariale delle donne (tutt'oggi ancora irrisolto a livello mondiale) nel culto di una astratta idealizzazione, sviluppatosi già negli assetti simbolici tipici della borghesia ottocentesca e, come ci insegna Karl Marx, finalizzato a dare – tramite una rappresentazione ideologica – un'immagine capovolta della realtà[6].

È opinione sufficientemente condivisa che la tradizione del pensiero marxista abbia contribuito a spostare la questione femminile dall'astrattezza ideale fondata su una retorica profondamente manipolativa di tipo ideologico alla realtà della concretezza storica e delle sue interne contraddizioni.

Lo avrebbe fatto tuttavia in modo insufficiente, come ha messo in rilievo gran parte della critica femminista del Novecento, che ha lamentato soprattutto la scarsa attenzione critica sul permanere di assetti relazionali iscritti nelle prassi sociale più diffusa – nella vita privata, nella politica, nel lavoro e nell'economia – che hanno a lungo contribuito a riprodurre pratiche patriarcali e sessiste del rapporto fra i generi anche all'interno dei movimenti rivoluzionari e anche nella vita di quei partiti e associazioni sindacali che ne hanno incarnato gli ideali. Insufficiente è apparsa anche l'analisi non solo dell'oppressione delle donne, ma del ruolo svolto dal genere nella riproduzione del capitale. I maggiori dibattitti – sostiene Cinzia Arruzza in *Il genere del capitale* – hanno riguardato la storia del lavoro domestico, tema secondo alcuni non sufficientemente preso in esame da Marx ed Engels, le vicende «del rapporto strutturale tra capitalismo e patriarcato, e, infine della riproduzione sociale (quest'ultima strettamente connessa al dibattito sul lavoro domestico ma di portata e respiro più ampi)»[7].

Si deve tuttavia solo alla capacità delle donne di prendere la parola, di conquistare gli spazi della vita pubblica, di scrivere su loro stesse, in virtù di quella che Eric Hobsbawm[8] ha definito l'unica rivoluzione compiuta nel Novecento, una trasformazione identitaria segnata da straordinarie esperienze di lotta, di ribellione, di emancipazione individuale e collettiva (senza dimenticare che ad esse hanno dato un importante contributo figure del femminismo marxista del primo Novecento, come Clara Zetkin, Rosa Luxemburg, Alessandra

6 B. Friedan, *The feminine mystique*, New York, W.W. Norton, 1963; tr. it., *La mistica della femminilità*; Roma, Castelvecchi, 2013. Sulla costruzione del genere come gabbia simbolica e materiale per le donne, nella storia dell'educazione, vedi S. Ulivieri (ed.), *Le bambine nella storia dell'educazione*, Roma-Bari, Laterza, 1999; C. Covato, *Idoli di bontà. Il genere come norma nella storia dell'educazione*, Milano, Unicopli, 2014.

7 C. Arruzza, *Il genere del capitale*, in S. Petrucciani (ed.), *Storia del marxismo*, Roma, Carocci, 2015, Vol. 3, p. 173.

8 E. Hobsbawm, *Age of Extremes. The short Twentieth Century 1914-1991*, London, Micael Joseph, 1994; *Il secolo breve*, tr. it, Milano, Rizzoli, 1995.

Kollontaji, Anna Kuliscoff)[9] che ha consentito la possibilità di aprire le porte di una prigione materiale e simbolica.

Per certi aspetti, in quella prigione, siamo ancora immersi e immerse in quanto ne abbiamo introiettato, a volte inconsapevolmente, i codici più subdoli e prescrittivi. Questa realtà, legata al permanere nella coscienza individuale e collettiva di antichi stereotipi di matrice patriarcale, sarebbe ancora più evidente se ciascuno di noi si impegnasse a fare l'inventario di se stesso, come suggeriva Antonio Gramsci invece di limitarsi a trovare l'ostacolo fuori di sé[10]. E non mancano nelle pratiche politiche dell'area della sinistra o del pensiero marxista, forme di 'reclusione' delle donne in un recinto di genere!

Nell'arco del Novecento, si deve, a mio avviso, a Virginia Woolf – pensatrice non marxista ma fortemente consapevole del rapporto fra genere e potere – una delle più radicali letture del rapporto fra le forme di un potere oppressivo (per usare una *categoria* elaborata poi da Herbert Marcuse)[11] e la liberazione delle donne, non *come* istanza aggiuntiva ma come premessa ineludibile per la liberazione dell'intera umanità.

Virginia Woolf, interpellata, alle soglie del secondo conflitto mondiale, nel 1938, su come fosse possibile prevenire la guerra ed arginare il diffondersi del nazifascismo sostenne, in *Le tre ghinee*[12], nel denunciare il rapporto inestricabile fra patriarcato e fascismo, che solo dalla radicale trasformazione del rapporto fra i sessi sarebbe potuta scaturire la possibilità di prevenire la guerra e, per questo, decise di destinare simbolicamente una ghinea alla edificazione di un *college* femminile a patto che vi si insegnasse la musica, la matematica, la letteratura e la medicina e non l'arte di uccidere e di accumulare terre e capitale, la seconda ad una associazione che promuovesse l'ingresso delle donne nelle libere professioni, la terza alle associazioni pacifiste maschili e femminili. Nel 1935 Edward Morgan Forster, suo amico e animatore di un comitato antifascista, l'aveva informata, destando il suo scandalo, che le donne non vi sarebbero state ammesse. Senza sradicare l'oppressione sessista implicita nel nazifascismo (ma paradossalmente introiettata nel senso comune allora – e forse ancora oggi presente – anche nei movimenti progressisti) non si può arginare la guerra, non

[9] Cfr. su questo tema, S. Tarantino, *Produzione e riproduzione nel femminismo marxista. C. Zetkin, A. Kollontaij*, in A. Cagnolati, A. Rossetti (edd.), *Donne ed economia. Tra assenza, subalternità e nuove soggettività*, Roma, Aracne, 2018, pp. 95-116.

[10] A. Gramsci, *Quaderni del carcere*, edizione critica a cura di V. Gerratana, Torino, Einaudi, 1975, pp. 137-38. Su questo tema, è di grande interesse, C. Meta, *Il soggetto e l'educazione in Gramsci. Formazione dell'uomo e teoria della personalità*, Roma, Bordeaux, 2019.

[11] E. Marcuse, *Interview*, in «Das Argument», vol. 23, 1962, pp. 2-12; tr. it. *La liberazione della donna in una società oppressa. Una conversazione fra Herbert Marcuse e Peter Furth*, in R. Laudani (ed.), *Marxismo e nuova sinistra*, Roma, Manifestolibri, 2017.

[12] V. Woolf, *Three Guineas*, London, Hogarth Press, 1938; tr. it., *Le tre ghinee*, Milano, Feltrinelli, 1979.

si può dare vita ad una rivoluzione culturale e lottare contro quel *fascismo eterno* di cui ci ha parlato Umberto Eco[13].

Ma qual è stato il rapporto fra il pensiero femminista e Karl Marx, Federico Engels e, più in generale, con la tradizione marxista?

Senza dubbio conflittuale. Una particolare attenzione, in una seppure sintetica ricostruzione del rapporto fra il marxismo e il pensiero femminista a partire dal Novecento, merita Simone De Beauvoir.

Nel suo rivoluzionario testo, *Il secondo sesso*[14], pubblicato per la prima volta nel 1949, dopo aver analizzato criticamente i ruoli attribuiti dal pensiero maschile alle donne, l'Autrice passa ad individuare i percorsi di una radicale alternativa emancipativa, affrontando temi fino ad allora tabuizzati della morale borghese e non solo (come il controllo delle nascite, l'aborto, la sessualità) sulla base di una indagine che percorre i territori della psicanalisi, del mito, della letteratura, dell'antropologia e della storia.

Nella prima parte, nel capitolo che prende in esame il tema del "destino", De Beauvoir dedica il terzo paragrafo al materialismo storico. In esso, prende in esame soprattutto il pensiero di Engels sulla base di un confronto serrato con le sue riflessioni teoriche, pervenendo nella sostanza a considerazioni piuttosto critiche.

Del pensiero di Engels, facendo in particolare riferimento a *l'Origine della famiglia*[15], viene soprattutto messa in discussione l'analogia fra il rapporto uomo-donna, da una parte, e proletariato e capitalisti, dall'altra. Resta, però, confermato il contributo positivo che Simone De Beauvoir riconosce al marxismo e che è proprio quello di aver ricondotto la realtà umana dall'astrattezza ideale alla concretezza della storia.

Una più chiara adesione ad una lettura marxista della questione femminile si deve poi, negli anni Settanta del Novecento, ad Angela Davis che ha avuto il merito, fra l'altro, di connettere la liberazione delle donne alla lotta contro il razzismo o ancora a Kate Millett, una delle più alte espressioni teoriche del femminismo radicale maturato a partire dagli anni Sessanta. Nella sua opera più celebre *La politica del sesso*[16], sostiene con forza che l'oppressione sessuale è una forma di dominio politico.

Più di recente, si può fare riferimento agli studi di Nancy Fraser, femminista di ispirazione marxista, che ha avuto il merito di aver posto come questione centrale la necessità di un ritorno del femminismo ad una politica dell'ugua-

13 U. Eco, *Il fascismo eterno*, Milano, La Nave di Teseo, 2018.

14 S. De Beauvoir, *Le deuxième* sexe, Paris, Gallimard, 1949; tr.it., *Il secondo sesso*, Milano, Il Saggiatore, 2008, pp. 121-122.

15 F. Engels, *Der Ursprung del Familie des Privateigenthumus und der States*. Im Auschluss an Lewis Mirgan's Forschungen Nottingen-Zurich, Verlag der Schweizerischen Volksbachandlung, 1884,; tr. it., *L'origine della famiglia della proprietà privata e dello Stato*, Roma, Editori Riuniti,1980.

16 K. Millet, *Sexual Politics*, New York, Dobleday,1970; tr. it., *La politica del sesso*, Milano, Rizzoli, 1971.

glianza sottratta a quella del puro riconoscimento identitario, facilmente manipolabile dal pensiero neo-liberista, e, inoltre, di aver sollevato la questione della rinascita di uno spirito insurrezionale, della critica all'androcentrismo capitalista, dell'analisi sistemica della denominazione maschile e di una rilettura di genere del rapporto fra democrazia e giustizia[17].

D'altra parte, nonostante si possa osservare una linea di tendenza positiva negli ultimi decenni – fortemente ridimensionata tuttavia dagli effetti della crisi economica mondiale che ha colpito il sistema finanziario capitalista occidentale negli Stati Uniti e in Europa a partire dal 2008 – nel campo dell'accesso delle donne nel mondo del lavoro, le giovani generazioni non sono immuni dalle discriminazioni e dagli stereotipi di genere, a sottolineare il fatto che il miglioramento economico da solo non basta a realizzare un mutamento culturale e sociale.

A questo proposito il filosofo Erbert Marcuse aveva evidenziato, già nel 1974, risorse, limiti e contraddizione della crescente occupazione femminile nelle società occidentali:

> L'indebolimento della base sociale del predominio maschile non ha messo fine al suo perpetuarsi ad opera della nuova classe dominante. La crescente partecipazione delle donne al processo di lavoro industriale, che ha minato le basi materiali della gerarchia maschile, ha anche esteso la base umana dello sfruttamento e lo sfruttamento industriale della donna come casalinga, madre, serva che si aggiunge al suo lavoro nel processo di produzione[18].

Proprio il tema della doppia presenza ha animato la vita, i temi e le iniziative dei movimenti femministi dagli anni '70 in poi, nel cui ambito, andando oltre le conquiste emancipazioniste, è maturata l'esigenza del superamento del cosiddetto ordine simbolico maschile e della nascita di una nuova prospettiva sociale e culturale, non disgiunta dall'avvento di relazioni fondate su di un rapporto fra i sessi liberato dal dominio (non si può non ricordare, a questo proposito, e solo a titolo esemplificativo, che, a livello normativo, l'abolizione del delitto d'onore e del matrimonio riparatore risalgono, in Italia solo 1981)[19].

Marx ed Engels

Nel tentativo di confrontarsi oggi col pensiero di Karl Marx e di Friedrich Engels in merito alla questione della liberazione delle donne, come ha acutamente

[17] Cfr. N. Fraser, *Justice Interruptus. Crtical Reflection on the "Postsocialist" condition*, New York, Routledge Publishing, 1997; tr.it. *La giustizia incompiuta. Sentieri del post-socialismo*, Lecce, Pensa MultiMedia, 2011.

[18] Marcuse, *La liberazione nella società repressiva*, cit., p. 159.

[19] Su questo tema cfr. L. Azara, *I sensi e il pudore. L'Italia e la rivoluzione dei costumi (1958-68)*, Roma, Donzelli, 2018.

osservato Rosaria Manieri in *Donne e capitale*[20] occorre fare alcune premesse. Nel corso dell'Ottocento, nel contesto delle grandi riflessioni sulla società e sulla transizione, in Europa, dall'economia post-feudale al capitalismo, i temi della condizione della donna e della crisi della famiglia, acquistano una nuova rilevanza teorica e investono anche la riflessione filosofica, sociologica ed etico-politica. Da questo punto di vista, mentre, ad esempio, il pensiero di Augusto Comte sembra, restare prigioniero di una visione della famiglia intesa come fattore di ordine sociale, al cui interno la donna deve svolgere un ruolo subordinato; le analisi più significative, in proposito, vanno ricondotte a John Stuart Mill, il quale vedeva nell'arretratezza della condizione femminile un residuo feudale e poneva istanze emancipative pur, secondo alcuni, nella logica di un riformismo borghese[21].

Si deve, poi, ad Augusto Bebel l'aver posto l'accento sul carattere diverso dell'oppressione della donna da quella dell'operaio quando, in proposito, affermava, nella sua fondamentale opera *La donna e il socialismo*, scritta in carcere nel 1889, che la donna è quale l'hanno fatta gli uomini e non può illudersi che l'uomo l'aiuti a uscire dalla sua condizione, nel modo stesso che gli operai hanno a sperar poco dalla borghesia[22].

Rispetto a questo retroterra culturale, possiamo chiederci su quali traiettorie si era mosso il contributo di Karl Marx e di Friedrich Engels?

Dagli scritti giovanili a quelli della maturità una riflessione sullo sfruttamento delle donne e su alcune specificità dell'alienazione femminile sono costantemente presenti, seppure in una forma non sempre organica.

Così come era stato sottolineato e riconosciuto anche da Simone De Beauvoir, Karl Marx, nei *Manoscritti economico-filosofici del 1844*, seppure non in forma sistematica, pone le basi di un discorso sul rapporto uomo donna finalmente strappato dal cielo dell'astrattezza speculativa «per essere ricondotto» – come sottolinea Rosaria Manieri – «sul terreno dello sviluppo storico e *concreto* dei rapporti sociali e dell'individualità umana, la quale a sua volta, non può essere colta nel suo sviluppo reale prescindendo dal lavoro sociale»[23].

Come il lavoro nella società capitalistica è una alienazione della forza-lavoro che diventa merce di cui il produttore perde il controllo «così la donna aliena se stessa dal momento in cui, mancando dei mezzi materiali per la sua autorealizzazione, esiste all'interno di un rapporto produttivo fondato su

[20] R. Manieri, *Donne e capitale*, Venezia, Marsilio Editore, 1971.

[21] J. Stuart Mill, *The Subjection of Women*, London, Longmans, Green, Reader and Dyer,1869; tr. it., *La servitù delle donne*, prefazione di Anna Maria Mozzoni, Lanciano, Carabba Editore, 1926.

[22] A. Bebel, *Die Frau und der Sozialismus*, Zürich-Hottingen, Verlag derVolkbuchhandlung 1879; tr.it. *La donna e il socialismo. La donna nel passato, nel presente e nell'avvenire*, Roma, Savelli, 1977.

[23] Manieri, *Donna e capitale*, cit., p. 98.

un dominio maschile che si appropria della sua essenza umana alienata e la possiede come oggetto sessuale, come progenitrice e come produttrice»[24].

Possiamo dire allora che in questa chiave interpretativa della storia alla luce del materialismo storico, così come il rapporto tra le classi, anche il rapporto fra i sessi si costituisce allora storicamente come rapporto antagonista.

«Il primo contrasto di classe che compare nella storia coincide – scrive Manieri – con lo sviluppo dell'antagonismo fra uomo e donna nel matrimonio monogamico, e la prima oppressione di classe coincide con quella del sesso maschile su quello femminile»[25].

Sebbene la monogamia abbia rappresentato nella storia dei rapporti fra i sessi un netto avanzamento nella misura in cui ha contributo a riscattare la donna dall'orda barbarica sessuale e ha posto le basi per lo sviluppo dell'amore individuale moderno che Engels valuta, in *L'origine della famiglia*, come una radicale elevazione morale, sconosciuta al mondo del passato; tuttavia le forme concrete con cui essa si è sviluppata non avrebbero consentito una liberazione dei sentimenti e della sessualità ma avrebbero determinato il permanere di un legame fondato sullo sfruttamento e la subordinazione dei bisogni della donna a quelli di una organizzazione della vita familiare segnata dal dominio maschile.

A questo proposito, nel criticare le tesi del cosiddetto «comunismo rozzo e volgare», nel *Manifesto del partito comunista*, Marx ed Engels approfondiscono ulteriormente questo punto. Vale la pena citare per intero questo illuminante brano:

> Abolizione della famiglia! Perfino i più avanzati fra i radicali si scandalizzano di così ignominiosa intenzione dei comunisti. Su che cosa si basa la famiglia odierna? Sul capitale, sul guadagno privato. Nel suo pieno sviluppo la famiglia borghese esiste solo per la borghesia; ma essa trova il suo completamento nella forzata mancanza di famiglia dei proletari e nella prostituzione pubblica. La famiglia del borghese cadrà naturalmente col venir meno di questo suo complemento, ed ambedue scompariranno con lo sparire del capitale. Ci rimproverate voi di voler abolire lo sfruttamento dei figli da parte dei loro genitori? Noi questo delitto lo confessiamo. Ma voi dite che sostituendo l'educazione sociale all'educazione domestica noi sopprimiamo i legami più intimi. Ma non è anche la vostra educazione determinata dalla società, dai rapporti sociali entro ai quali voi educate, dall'intervento più o meno diretto o indiretto della società per mezzo della scuola, ecc? Non sono i comunisti che inventano l'influenza della società sull'educazione; essi ne cambiano il carattere; essi strappano l'educazione all'influenza della classe dominante. Le declamazioni borghesi sulla famiglia e sull'educazione, sugli intimi rapporti fra genitori e figli diventano tanto più nauseanti, quanto più, in conseguenza della grande industria, viene spezzato per i proletari ogni legame di famiglia, e i fanciulli vengono trasformati in semplici articoli di commercio e strumenti di lavoro[26].

[24] *Ibid*., p. 100.
[25] *Ibid*., p. 101.
[26] F. Engels, K. Marx, *Manifest der Kommuistichen Partei*, London, Bildungs Gesellschaft für Arbeiter von J.E, Burghard,1848; tr.it., *Manifesto del partito comunista*; Napoli, Laboratorio politico,1977, p. 57.

In *La situazione della classe operaia in Inghilterra* (1845), Engels ci offre un quadro drammatico delle condizioni fisiche degli operai ed anche del lavoro dei fanciulli. Nel denunciare il diffondersi di suicidi nella classe lavoratrice, afferma che una legge sulle fabbriche del 1834 proibiva

il lavoro dei fanciulli sotto i nove anni (fatta eccezione per i setifici) limitava il tempo di lavoro dei ragazzi tra 9 e 13 anni a 48 ore settimanali o, al massimo, a 9 ore giornaliere, quello dei giovani tra i 14 e i 18 anni a 69 ore settimanali o al massimo, a 12 ore giornaliere, stabiliva un intervallo limite di un'ora e mezza per il pasto, e ancora una volta proibiva il lavoro notturno per tutti i minori di 18 anni […]. Se oggi si facesse girare una commissione per le fabbriche, troverebbe che le cose sono rimaste su per giù come prima[27].

Lo sfruttamento delle operaie segue un andamento simile. A titolo esemplificativo, può essere utile ricordare che, alla fine dell'Ottocento nelle filande torinesi le operaie lavorano in media 16 ore al giorno, sedute davanti ad una bacinella d'acqua bollente, con le dita là dentro a scuotere i bozzoli e a tirarne il filo. Ci vorrà una legge del 1899 per fissare un massimo di 12 ore e per l'interdizione dal lavoro notturno per le donne e i ragazzi dai 13 ai 15 anni.

La denuncia delle condizioni di sfruttamento del lavoro nelle fabbriche e il disvelamento della condizione di semi-schiavitù di donne e di bambini è la premessa per comprendere il contributo dirompente di Marx ed Engels alla messa in discussione della dimensione di 'genere' nella produzione capitalistica.

Ma voi comunisti – sostengono Marx ed Engels riferendosi ai loro detrattori – volete la comunanza delle donne-ci grida in coro tutta la borghesia […]. Del resto nulla è più ridicolo del moralissimo sgomento dei nostri borghesi per la pretesa comunanza ufficiale delle donne nel comunismo. I comunisti non hanno bisogno di introdurre la comunanza delle donne, essa è quasi sempre esistita […] Il matrimonio borghese è, in realtà, la comunanza delle donne, ipocritamente celata, una comunanza ufficiale palese. Si comprende del resto benissimo che con l'abolizione degli attuali rapporti di produzione scompare anche la comunanza delle donne che ne risulta, vale a dire la prostituzione ufficiale e non[28].

È necessario, sottolineano, sottoporre a critica il fatto che la donna sia ridotta a mero strumento di produzione. Di conseguenza, poiché il borghese ritiene che il comunismo segni anche la comunanza delle donne, egli non coglie che il vero problema è quello di abolire la posizione della donna come semplice strumento di produzione. Scrive Engels, nelle sue conclusioni, in *L'origine della famiglia*:

Quello che noi oggi possiamo dunque presumere circa l'ordinamento dei rapporti sessuali, dopo che sarà spazzata via la produzione capitalistica […] è principalmente di carattere negativo, e si limita per lo più a quello che viene soppresso. Ma che cosa si aggiungerà?

[27] F. Engels, *Die Lageder arbeitenden Klasse in England*, Leipzig, Verlag des Volkbuchhandling, 1845; tr. it., *La situazione della classe operaia in Inghilterra (1845)*, cit. in M.A Manacorda, *Il marxismo e l'educazione. Testi e documenti (1843-1964)*, Roma, Armando, 1964, Vol. I, pp. 44-45.

[28] Marx, Engels, *Manifesto del partito comunista*, cit., p. 58.

Questo si deciderà quando una nuova generazione sarà maturata. Una generazione di uomini i quali, durante la loro vita, non si saranno mai trovati nella circostanza di comperarsi la concessione di una donna con il denaro e mediante altra forza sociale; e una generazione di donne che non si saranno mai trovate nella circostanza né di concedersi ad un uomo per qualsiasi motivo che non sia vero amore, né di rifiutare di concedersi all'uomo che amano per timore delle conseguenze economiche[29].

Queste osservazioni appartengono indubbiamente all'ideazione di una *società dell'avvenire*. Si tratta di una visione progettuale non priva di elementi utopici che sono presenti anche nel pensiero di August Bebel e, in particolare, nell'opera già citata, *La donna e il socialismo* dall'emblematico sottotitolo *La donna nel passato, nel presente e nell'avvenire*, che, come si è detto, rappresenta la prima opera organica di analisi della specificità dell'alienazione e dello sfruttamento delle donne, del loro asservimento culturale e nella vita familiare e la cui liberazione viene tuttavia affidata a quella società socialista che nascerà dopo la rivoluzione[30].

Si tratta di una prospettiva assai pregnante ma dai confini ancora incerti.

Casa Marx

Varchiamo ora le soglie di casa Marx fermandoci, però, sull'uscio perché l'analisi della biografia di Marx e della storia della sua familiare è un tema, d'altra parte come sempre quando si affronta «evitare facili schematismi o discutibili giudizi di valore.

Di recente affrontato in sede filmica (*Il giovane Karl Marx* di Roul Peck del 2017) ed efficacemente approfondito in uno studio assai accurato della storica Michelle Perrot che, nel 1979, scrive una importante introduzione alla edizione francese di 106 lettere inedite che le tre figlie di Marx, Eleanor, Jenny e Laura si scambiano fra di loro e con i loro genitori tra il 1866 e il 1898[31].

Scrive Michelle Perrot:

De cette correspondance, la famille Marx est donc le théâtre et l'acteur. Surprenant famille juive dans sa structure très patriarcale, victorienne dans ses moeurs, et traverse par un grande projet qui fait son unité et soude son destin. Feuilottons l'album; au reste les photos ni manquent pas: les Marx sont frainds de ce substuit de portrait. Jenny encadre elle-même celle que lui envoie son père, 'en grand format, splendide, tout à foit raisssemblant. Aucun peintre n'aurait pu y mettre plus d'expression' […]. Marx, – «Le Maître», Mohr, Challey, Old Nick, etc., l'abondance des surnoms soulignant sa presence – domine de toute sa stature

29 Engels, *L'origine della famiglia*, cit., pp. 109-110.

30 Cfr. Bebel, *La donna e il socialismo*, cit.

31 M. Perrot, I*ntroduction*, in O. Meier (ed.), *Les filles de Karl Marx. Lettres inédites*, Paris, Albin Michel, 1979.

cette tribu sur laquelle il regne, dèspote affecteux et tyrannique. Ses filles lui vouent un véritable culte. Coquettes comme de collégiennes, elles guettent leur noms dans les lettres, feignant la jalousie s'il mentionne l'une plutôt que l'autre. Ses filles lui vouent un veritable culte […]. Père affecteux, sans aucun doute, attentif au petite choeses de la vie, au rituels des fêtes ou des anniversaires, à la santé et à l'avenir des ses filles, comme il le fut jadis à leur jeux, Marx était aussi un pére conformiste, ayant en matière d'éducation, des rélations amoureuses, d'alliances matrimoniales et d'établissement, les idèes de son milieu et de son temps[32].

Scorrendo questo passo di Michelle Perrot si può desumere come *casa* Marx fosse contrassegnata dalle contraddizioni e dalle metamorfosi che hanno caratterizzato la storia della famiglia nel corso dell'Ottocento.

Marx sposa la nobildonna Jenny Von Westphalen che per lui lascerà un destino elevato e affronterà le *epopee rivoluzionare* ma anche le ristrettezze economiche di una vita terribilmente precaria[33]. Un matrimonio – il loro – che gli esperti del settore definirebbero di *inclinazione* in un periodo storico nel quale i matrimoni di convenienza costituivano ancora il costume più diffuso sebbene incrinato dal lento insorgere di nuovi stili sociali e di nuove modalità delle relazioni coniugali ed affettive[34].

Alla presenza carismatica della figura paterna, farà sempre da contraltare Jenny:

En contrejour, la Mère attentive et discrète, mystérieuse présence aux traces affracées par les siens comme s'ils en redoutaient quelqe ombre, quelque trouble. Celle que fut jadis la reine du balle de Trèves, la belle et brillante Jenny Von Westphalen, de noble famille prtotestante, épousée non sans problème – les drammes sourmontés des la mésalliances avec un Juif allemande –, n'est plus que Mützchen (por elle peu de surnom), une femme usèe, lasse d'avoir tant donné, vouèe aux choses du foyer, sans cesse encombrée de courses et de paquets, femme d'anterieur commele peindra Veillard, couisinant et cousant interminablement pour ses files et ses petit-enfants[35].

La storia della famiglia è contraddistinta da vicende economiche piuttosto precarie e, allo stesso tempo, da problemi che caratterizzano un'intera epoca: la mortalità infantile, ad esempio.

I coniugi Marx perdettero tre figli, avendo difficoltà addirittura per trovare i soldi necessari al funerale: Heirich, Franziska (piccolissimi) ed Edgar di otto anni, la cui morte lasciò la casa – come Marx confidò ad Engels – del tutto desolata e vuota, perché il bambino ne era l'anima. Restavano però tre amate bambine: Jenny, Laura ed Eleanor (entrambe quest'ultime due morte suicide da

32 Perrot, *Introduction*, in *ibid*., pp. 12-13.

33 Vedi a questo proposito, fra gli altri, F. Mehring, *The story of his life Marx*, New York, Rottledge, 2003; F. Wheen, *Karl Marx: a life*, London, Fourth Estate, 2001.

34 Su questo tema, si vedano, fra gli altri, M. Barbagli, *Sotto lo stesso tetto. Mutamenti della famiglia in Italia dal XV al XX secolo*, Bologna, il Mulino, 1996 e M. Barbagli, D.I. Kertzer (edd.), *Storia della famiglia in Europa. Il lungo Ottocento*, Roma-Bari, Laterza, 2002.

35 Perrot, *Introduction*, cit., p. 14.

giovani, vittime di relazioni amorose complesse e di quella sorta di impedimento all'emancipazione che, nonostante la nascita sul finire del secolo dei primi movimenti emancipazionisti, caratterizzò l'Ottocento delle donne costrette o in una condizione di sfruttamento estremo nel mondo del lavoro – come sia Marx sia Engels denunciarono con forza – o, per i ceti borghesi, in una gabbia simbolica e sociale ancora assai costrittiva[36].

Scorrendo la corrispondenza epistolare affiora con forza la presenza, nel corso della loro esistenza, di una relazione intensissima delle figlie col padre, una felice 'crepa' negli schematismi a volte presenti nella storia della privata e della sociale della vita familiare che indulgono solo sulla mancanza di spessore affettivo della figura paterna.

Le lettere, allo stesso tempo, ci introducono nei ritmi della vita quotidiana, dei sogni, delle aspirazioni, degli eventi, dei drammi, dei riti familiari contrassegnati da una regia paterna sempre affettuosissima e densa di stimoli culturali. Affiora, allo stesso tempo la grande carica affettiva sempre manifestata dalle figlie nei confronti di papà Marx.

Scrive Eleonora, il 26 aprile del 1867, al padre che si trovava a Londra:

> Mon chère Papà,
> Au moment même où ta lettre est arrivée, je venais de déclarer que tu ne povais pas rester absent toute un quinzaine semain sans écrire et que je ne te le pardonnerais jamais; mais ma colère s'est dissipée d'une façon étonnament rapide dès qu'on a lu ta lettre, et maintement c'èst moi qui suis en train de t'écrire […]. Maintenet mon cher Papà, au revoir. Crois bien que je reste ta fille IRrespecteuse[37].

Un anno dopo, così scrive al padre la figlia Laura:

> J'ai été très déçue lorsque tes lettres adressées à mes deux supérireurs sont arrivée, car javais plus ou moins compté sur quelque lignes destinées à ma personne; je te prie de mettre cet espoir tout à fait injustifiable sur le compte de la présomption naturelle aux tailleurs en général et à un certain tailleur en particulier. J'ai été aussi très mortifiée d'apprendre que tu attribuais à mes exercices équestres ou autres le fait de n'avoir pas écrit; la vérité, c'est que depuis que Jenny t'a expédié sa lettre (dont je n'ai rien su, sinon j'y aurais joint un mot), nous avons vécu dans l'attente de tes nouvelles ou de ton retour, et toutes les fois que j'allais t'écrire, on m'en a dissuadée[38].

Michelle Perrot ha ipotizzato che la presenza di un dominio sentimentale del padre nei confronti delle figlie, oltre ad essere caratterizzata da una straordinaria carica affettiva, non fosse esente dall'ansia di un legame fusionale, come le lettere mettono spesso in evidenza e che si manifesta nel dichiarare, ad esempio,

36 Cfr. G. Fraisse, M. Perrot (edd-), *L'ottocento*, Roma-Bari, Laterza, 1992.
37 Meier (ed.), *Les filles de Karl Marx*, cit., pp. 74-75.
38 *Ibid*., pp. 80-81.

che Tussy (nomignolo di Eleanor, la più piccola) «sono io». È tutta come me… «Tussy c'est moi»[39].

Si può anche ipotizzare che l'egemonia sentimentale di Marx nei confronti delle figlie scaturisse, oltre che dall'amore paterno, da un bisogno di protezione nei confronti di figure – quelle femminili – che senza dubbio vivevano in quegli anni una condizione di fragilità e debolezza. Ma si può anche ipotizzare che anche Marx non fosse esente dall'esercitare un dominio intellettuale ed affettivo legato ad forte bisogno di rispecchiamento, come, ad esempio, accadde, secondo alcune ipotesi interpretative, nel rapporto fra Sigmund Freud e la figlia Anna[40].

[39] Perrot, in *ibid*., p. 14. Cfr., a questo proposito, C. Covato, *Memorie di cure paterne. Genere, percorsi educativi e storie d'infanzia*, Milano, Unicopli 2002.

[40] Cfr., a questo proposito, L. Andreas-Salomé, A. Freud, Daria A. Resschetylo-Rothe IngeVeber *«'ala käm ich heim zu Vater und Schwester'. Lou Andreas-Salomé Anna Freud Briefwechsel 1919-1937»*, München, Deutscher Taschenbuch, 2004; L. Andreas-Salomé, *A l'ombre du père. Correspondance*, 1919-1937, Paris, Hachette, 2006.

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Cento anni dalla scomparsa di *Vamba*: contributo per un bilancio storiografico su «Il Giornalino della Domenica» e per l'individuazione di nuove prospettive di ricerca

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One hundred years after the death of Vamba*: a paper for a historiographical report on «Il Giornalino della Domenica» and to identify new research perspectives*

ABSTRACT: After a brief review of the criticalities and strong points of the historical research on Luigi Bertelli, and based on the latest epistemological and methodological approaches developed in the field of the history of education and children's literature, this contribution intends to explore renewed subjects and new issues related to *Vamba*'s production, as a writer and journalist for children and youth. Starting from the editorial experience of «Il Giornalino della Domenica», to understand the real value of *Vamba*'s influence on the twentieth century periodical press, it is necessary to analyze the development of his educational project. The liberal ideals, typical of the Italian Risorgimento, were the baseline of this comprehensive plan, that aimed to reform the ethical and civil awareness of young bourgeois generations.

EET/TEE KEYWORDS: Luigi Bertelli (*Vamba*); «Il Giornalino della Domenica»; Children's literature; Periodical press; Italy; XIXth-XXth Centuries.

1. *Criticità e capisaldi della ricerca su Luigi Bertelli (*Vamba*) scrittore per l'infanzia, a cento anni dalla sua scomparsa*

Nella schiera degli intellettuali di spicco del panorama culturale e politico italiano del Novecento è ormai da annoverarsi a pieno titolo la figura poliedrica

di giornalista, bibliofilo, educatore e scrittore di Luigi Bertelli[1], in arte *Vamba*[2].

A cento anni dalla sua scomparsa, avvenuta nel novembre 1920[3], la letteratura scientifica di ambito storico-pedagogico ha ben delineato la figura del Bertelli scrittore per l'infanzia mentre permangono ancora alcune ambiguità circa la corretta interpretazione del progetto educativo, che ha caratterizzato, in prima istanza, la sua esperienza editoriale de «Il Giornalino della Domenica»[4].

Come ben riportato da Anna Ascenzi, Maila Di Felice e Raffaele Tumino nella premessa al volume *«Santa Giovinezza!». Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, negli approcci finora applicati dalla letteratura critica nei confronti di *Vamba* si possono individuare generalmente

[1] Ampia e ormai nota è la bibliografia su Luigi Bertelli. Tra le opere più significative e pur senza pretesa di esaustività si ricordano, per esempio, i profili biografici delineati all'indomani della sua morte da amici e collaboratori apparsi su numerose riviste dell'epoca, quali: G. Cavaciocchi, *Vamba*, «La Gazzetta Livornese», Livorno, 28 novembre 1920; F. Mastrigli, *Vamba*, «Il Tempo», Roma, 28 novembre 1920; C. Paladini, *Vamba*, «Il Nuovo Giornale», Firenze, 28 novembre 1920; Yambo, *Vamba, l'amico dei bambini*, «La Nazione», Firenze, 28 novembre 1920; M. Adami, *Vamba: per l'opera sua*, «Arena», Verona, 30 novembre 1920; G.E. Nuccio, *Vamba*, «I Diritti della Scuola», Roma, 4 dicembre 1920; l'intero numero del 5 dicembre 1920 de «Il Giornalino della Domenica»; U. Fleres, *Vamba*, «Nuova Antologia», Roma, 15 dicembre 1920; G.E. Nuccio, *Necrologio di Vamba*, «Il Giornalino della Domenica», Firenze, 19 dicembre 1920; o, ancora, i ritratti emersi dai lavori di molteplici studiosi del secolo scorso e contemporanei, tra cui: G. Fanciulli, E. Monaci Guidotti, *La letteratura per l'infanzia*, Torino, SEI, 1942; P. Bargellini, *Tre toscani: Collodi, Fucini, Vamba*, Firenze, Vallecchi, 1952; M. Mencarelli, *Vamba e due parole sulla letteratura per l'infanzia*, Firenze, Bemporad Marzocco, 1952; L. Nissim Rossi, *Vamba (Luigi Bertelli)*, Firenze, Le Monnier, 1954; P. Hazard, *Letteratura infantile*, Milano, Viola, 1954; C. Portanova, *Vamba (Luigi Bertelli)*, Pozzuoli, Conte editore, 1957; L. Nissim Rossi (ed.), *Le grandi firme del «Giornalino della Domenica»*, Firenze, Bemporad Marzocco, 1959; G. Fanciulli, *Scrittori e libri per l'infanzia*, Torino, SEI, 1960; A. Lugli, *Storia della letteratura per l'infanzia*, Firenze, Sansoni, 1960, *ad indicem*; L. Sacchetti, *Storia della letteratura per ragazzi*, Firenze, Le Monnier, 1962, *ad indicem*; A. Michieli, *Vamba*, Brescia, La Scuola, 1965; M. Barsali, *Bertelli Luigi (Vamba)*, in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1967, Vol. IX, pp. 494-499; A. Faeti, *Letteratura per l'infanzia*, Firenze, La Nuova Italia, 1977, *ad indicem*; R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 1997, *ad indicem*; P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, GLF Editori Laterza, 2006, *ad indicem*; A. Ascenzi, *Bertelli Luigi*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionario Biografico dell'Educazione (1800-2000)*, 2 voll., Milano, Editrice bibliografica, 2013, Vol. I, pp. 147-148.

[2] A proposito del suo pseudonimo, nel n. 35 anno III de «Il Giornalino della Domenica», nell'incipit della cronaca fotografica *Rivista dei ragazzi in vacanza*, *Vamba* scriveva: «Fortunatamente io sono dotato di una doppia natura, e in me si completano e si confortano a vicenda il *Vamba* capo di uno Stato e il *Vamba* giullare, in grazia delle due origini del mio pseudonimo del quale già promisi di rivelare il mistero. Del giullare è facile rintracciar l'origine dell'*Ivanohe* di Walter Scott dove troverete un *Vamba* buffone di Cedric e avrete anche il piacere di trovare la gentile *Lady Rowena*. Del capo di Stato è arduo trovar le tracce… ma se avete occasione di andare a Toledo e di visitare la chiesa di Santa Leocadia vi troverete le reliquie di un re *Vamba* trasportatevi da Pampiega per ordine di re Alfonso X» (Vamba, *Rivista dei ragazzi in vacanza. (Cronaca fotografica estiva)*, «Il Giornalino della Domenica», a. III, n. 35, 30 agosto 1908, pp. 1-48, la citazione è a p. 1).

[3] Luigi Bertelli si spense il 27 novembre 1920 a Firenze e fu sepolto nel Cimitero delle Porte Sante, presso la Basilica di San Miniato (FI).

[4] Il primo numero de «Il Giornalino della Domenica» uscì il 24 giugno 1906; il periodico, edito da Bemporad, aveva sede a Firenze ed era allora diretto dallo stesso Bertelli.

due principali criticità: la prima riguarda l'analisi della sua attività di scrittore per l'infanzia intesa come fine a se stessa, quindi come un'iniziativa poco o per nulla correlata al suo lavoro da giornalista e ai suoi interessi politici e culturali; la seconda, invece, riguarda la 'povertà' di riferimenti alle fonti archivistiche e ai carteggi originali dell'autore[5]. Due criticità, queste, in realtà estremamente correlate tra loro, in quanto, proprio da un'attenta analisi degli scritti di *Vamba*, emerge chiaramente come il suo successivo interesse per l'infanzia e l'adolescenza sia in verità una sorta di evoluzione 'naturale' della precedente attività in ambito giornalistico.

Dopo un primo e breve impiego presso le Ferrovie dello Stato[6], infatti, e dopo essersi trasferito a Roma, Bertelli aveva dato avvio alla sua carriera da giornalista facendo uso in particolar modo dello strumento della satira politica e di costume, e dei così detti *pupazzetti*[7]. Tra le sue collaborazioni più importanti non si possono non citare, per esempio, quella con il «Capitan Fracassa», noto periodico diretto da Luigi Arnaldo Vassallo (*Gandolin*), quella con il «Fanfulla»[8], o, ancora, con il «Don Chisciotte della Mancia», di cui peraltro fu tra i suoi fondatori.

Tra il 1884 e il 1892 Bertelli fu, di fatto, principalmente autore di almanacchi e albi[9], di articoli polemici e umoristici destinati non solo a commentare, ma soprattutto a denunciare l'inadeguatezza e le nefandezze della classe dirigente italiana, come testimoniano, tra l'altro, le numerose caricature dedicate ai principali esponenti politici dell'epoca, come Depretis, Crispi, Rudinì e Magliani, ai quali, nello specifico, veniva rimproverato una sorta di egoismo di partito a discapito delle esigenze reali del Paese.

[5] A. Ascenzi, M. Di Felice, R. Tumino (edd.), *«Santa Giovinezza!». Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica edizioni, 2008, pp. 9-10.

[6] Dopo la morte del padre, Enrico Bertelli, avvenuta nel 1873, e una volta terminati gli studi presso gli Scolopi, Luigi Bertelli trovò un primo impiego presso le Ferrovie dello Stato, nello specifico nella Rete adriatica, per cui fu destinato prima a Rimini e poi a Foggia; già all'epoca Bertelli aveva però iniziato a disegnare le prime caricature e a scrivere i primi pezzi di satira politica.

[7] I *pupazzetti* erano delle caricature, macchie a punta di penna che si utilizzavano per illustrare gli articoli. L'On. Giovanni Rosadi, esponente della destra liberale, nel suo discorso *In Memoria di Luigi Bertelli (Vamba)*, Firenze, Stab. C. Cocci & C., 1923, pronunciato il 14 gennaio 1923 in occasione dell'inaugurazione del monumento al Monte alle Croci, definisce il *pupazzetto* come «amabile e ingegnosa applicazione dell'arte all'infantilismo, preferibile al primitivismo anacronistico e bugiardo; applicazione oh! Quanto più eletta del ritratto in fotoincisione di ogni uomo del giorno e del suo cameriere, di tutti gli amanti fuggiaschi o suicidi e de' più volgari delinquenti del furto e del coltello: colpa, s'intende bene, del pessimo gusto dei lettori!…».

[8] Sul giornalismo polemico e battagliero dei periodici romani, si vedano: G. Squarciapino, *Roma bizantina*, Torino, Einaudi, 1950; N. Tranfaglia, *La stampa italiana nell'età liberale*, Bari, Laterza, 1979; O. Majolo Molinari, *La stampa periodica romana dell'Ottocento*, Roma, Istituto di studi romani, 1963, Vol. II.

[9] A titolo esemplificativo si ricordano *Il Barbabianca*, Roma, Tip. Virano, 1887; *Il figlio d'Otello, fatto di cronaca del '300 o giù di lì, cattiva azione modificata secondo le esigenze musicali e locali*, Roma, Tip. giuridica, 1897; *L'onorevole Qualunqui e i suoi ultimi diciotto mesi di vita parlamentare*, Roma, Tip. Coop. Sociale, 1898; *Tra i pesci*, Roma, s.d.

Bertelli, come è noto, era animato dagli ideali laici e democratici tipici del Risorgimento italiano, fervente sostenitore delle idee mazziniane e accanito oppositore di quel trasformismo proprio della classe politica di fine Ottocento. Le sole tesi democratiche e repubblicane, tuttavia, erano risultate insufficienti al superamento delle numerose problematiche e conflittualità emerse all'indomani dell'Unità d'Italia; il Paese, seppur politicamente unificato, non era ancora 'nazione' e, di fatto, era altresì necessario dare avvio a un vero e proprio processo di costruzione di un comune sentimento nazionale e di un patrimonio culturale e valoriale condiviso.

In questo contesto, le capacità satiriche e letterarie di *Vamba* gli permisero di sollevare questioni di notevole rilevanza, pur mantenendo sempre un approccio umoristico, una costante questa, che caratterizzò la sua produzione anche nel periodo in cui si dedicò all'infanzia e alla gioventù.

A partire dai primi anni Novanta dell'Ottocento, sempre più deluso dall'inettitudine della classe dirigente italiana, Bertelli iniziò a maturare la convinzione e la necessità di rivolgersi a un pubblico nuovo. A questo proposito Anna Ascenzi sottolinea come

> la graduale presa di coscienza della necessità di lasciarsi alle spalle le ormai sterili polemiche politiche giornalistiche e di mutare radicalmente il registro del proprio impegno intellettuale e politico coincise, in Luigi Bertelli, con la maturazione di un nuovo ideale al quale dedicare i propri sforzi di giornalista e scrittore e la propria vena creativa: la formazione di una nuova coscienza etico-civile nelle giovani generazioni, nello spirito di quella pedagogia politica tanto cara al suo idolo Giuseppe Mazzini e ai grandi uomini del Risorgimento[10].

Vamba capì, quindi, che per apportare un cambiamento significativo e concreto allo scenario politico e, in linea ancora più generale, a quello civile italiano, era necessario intervenire sulle nuove generazioni, sulla formazione della loro coscienza civile e sul loro modo di approcciarsi ai problemi di interesse nazionale: pertanto più che una «crisi», il passaggio alla letteratura per l'infanzia e la gioventù si potrebbe definire come una sorta di metamorfosi dell'impegno politico di *Vamba*, il quale, deluso e amareggiato dall'inefficienza degli esponenti di partito e dall'assopimento dell'opinione pubblica, decise di intervenire *ex ante* sulla formazione degli ideali delle giovani generazioni di italiani. «Gli uomini sono ormai guasti irrimediabilmente e con loro non c'è nulla da fare: è fatica sprecata. Coi ragazzi no: hanno il cuore puro e l'animo pronto ad ogni slancio generoso: da loro si può ottenere quello che si vuole», così Bertelli giustificava il suo interesse nei confronti della gioventù; egli aveva estrema fiducia nelle capacità e nel senso di responsabilità civile di giovani

[10] Ascenzi, Di Felice, Tumino, *«Santa Giovinezza!». Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, cit., p. 17.

e bambini, in quanto i loro animi non erano ancora stati 'macchiati' dalla corruzione e dai compromessi, tipici invece del mondo adulto[11].

La stagione del 'Bertelli educatore' venne ufficialmente inaugurata nel 1893, anno in cui tornò a Firenze e in cui diede alle stampe *Ciondolino*, il suo primo libro per ragazzi, edito da Bemporad[12]. In apertura del testo, *Vamba* scrisse: «Ho pensato, bambini, di farvi vedere molte cose grandi negli esseri piccoli… Più tardi, nel mondo, vedrete molte cose piccole negli esseri grandi», una dedica significativa, che mette in luce ancora una volta la delusione dell'autore e che motiva la sua scelta di dedicarsi a un nuovo pubblico di lettori.

Successivamente, nel 1952, Bargellini ben puntualizzava:

> […] il vecchio Vamba, motteggiatore e caricaturista, non morì mai, e la dolorosa lisca della politica gli rimase attraverso la gola. Si avvertì sempre, anche quando Vamba parlò ai più innocenti bamberottoli, un certo raschìo, come di colui che abbia subìto delusioni e al quale sia rimasto, non diciamo un rancore, ma un risentimento. […] Vamba invece non si liberò mai dal suo passato. Quasi a ogni pagina affiora il polemista o per lo meno l'ironista. Fin dalla dedicatoria di *Ciondolino* s'avverte l'«animus» amaro del critico […]. Non sono parole di chi si senta in pace col prossimo adulto, specie con l'adulto prossimo politico. Nella letteratura infantile Vamba apparirà sempre un po' svagato, come chi pensa ad altro che ai ragazzi. E parlando ai ragazzi parrà sempre voler dire: «Andatelo a raccontare ai vostri genitori». Dice al ragazzo, perché l'adulto intenda[13].

Ciondolino, frutto della contaminazione tra Collodi, Fabre e Maeterlinck[14], si inseriva nel filone della divulgazione scientifica[15] e riprendeva temi cari alla pedagogia del secondo Ottocento: il protagonista del racconto Gigino/

11 Sul tema della sincerità e dell'innocenza dell'infanzia rispetto alla falsità del mondo adulto *Vamba* torna poi spesso tra le pagine de «Il Giornalino della Domenica»; si legge per esempio in un articolo del 1910: «E i bambini ci apparivano, anche nei loro difetti, anzi forse appunto per i loro stessi difetti, le più graziose creature di questo mondo, germogli genuini della pianta umana non ancora concimati da tutte le ipocrisie sociali né potati nelle loro fresche energie da leggi di convivenza e di convenienza, né piegati artifiziosamente coi lacci di tutte le limitazioni, di tutte le convenzionalità, di tutte le ridicolaggini che regolano la nostra esistenza nella collettività. Si sapeva che l'uomo nasce anarchico, cioè insofferente e ribelle a tutte le leggi che egli si è imposte per disciplinare la sua natura nelle esigenze del viver sociale, e ci piaceva per questo nella sua più tenera età, quando, non il germe della delinquenza, ma uno spontaneo, irresistibile bisogno e amore di libertà intera, completa e sconfinata che […] non appaiono per niente ispirati da una istintiva predilezione per il male» (Vamba, *Il dottore Erode*, «Il Giornalino della Domenica», a. V, n. 8, 20 febbraio 1910, pp. 8-13).

12 Vamba (L. Bertelli), *Ciondolino*, Firenze, Bemporad, 1893.

13 Bargellini, *Tre toscani: Collodi, Fucini, Vamba*, cit., pp. 233-235.

14 A titolo esemplificativo si vedano le riedizioni delle opere di Fabre e Maeterlinck: J.H. Fabre, *Le monde merveilleuse des insectes*, Parigi, Delagrave, 1921; M. Maeterlinck, *La vita delle api. La vita delle termiti. La vita delle formiche*, Roma, Newton Compton, 1991.

15 Nell'ambito della letteratura giovanile in Italia, in realtà il racconto rappresenta il primo esempio di divulgazione scientifica; numerose furono anche le sue traduzioni, tra cui ricordiamo quella della contessa de Gencé, *Gigi parmi les insects*, Parigi, M. Albin, 1922; quella di S.F. Woodruff, *The Prince and his ants*, New York, L. Kellogg Holt and Company, 1937; e quella di C. De Castro, *Pingajillo el Muchacho que se volviò hormiga*, Barcellona, Hyssa, 1943.

Ciondolino, un ragazzo negligente, svogliato e disobbediente, invidioso della 'presunta' libertà delle formiche, viene trasformato a sua volta in formica e catapultato in un mondo sconosciuto e del tutto diverso da come si aspettava. Il viaggio di Gigino in questo nuovo ambiente si rivela un viaggio educativo e formativo: l'intento dell'autore, infatti, non era solamente quello di avvicinare il giovane pubblico alle scienze naturali, ma soprattutto quello di promuovere una serie di insegnamenti di carattere civile e morale, necessari alla comprensione degli obblighi e dei doveri che ciascun individuo deve adempiere nei confronti della società e della comunità in cui è inserito.

Questa prima opera dedicata all'infanzia testimonia come l'impegno politico e civile di Bertelli non sia affatto venuto meno con il passaggio a un altro genere di attività letteraria, anzi, se possibile, esso si era fatto ancora più serio e concreto. D'altro canto, si deve pur ammettere che la delusione nei confronti della classe politica italiana, non fu l'unica motivazione che spinse *Vamba* a divenire scrittore per l'infanzia, alla base della sua decisione vi erano, infatti, anche ragioni di carattere economico, in quanto all'epoca la produzione per l'infanzia era considerata più remunerativa rispetto a quella satirica e giornalistica[16], e ragioni per così dire personali: nel 1903 Bertelli era diventato padre per la prima volta[17] e ciò contribuì notevolmente ad accrescere il suo entusiasmo e il suo interesse nei confronti degli argomenti di carattere educativo-pedagogico ed etico-civile.

La letteratura critica attribuisce giustamente la fortuna di *Vamba*, in qualità di scrittore per l'infanzia, alla sua capacità di farsi «bambino tra i bambini», ovvero alla sua abilità di porsi sullo stesso piano dei suoi lettori. Rispetto alla letteratura giovanile tipica dell'Ottocento, moraleggiante, edificante e maggiormente didascalica[18], Bertelli proponeva un nuovo modo di approcciarsi all'infanzia, una modalità che si potrebbe definire *empatica* e sincera; attraverso un linguaggio semplice, ironico e accattivante, egli fu in grado di presentare e spiegare, anche ai più piccoli, ideali e temi di rilevante interesse morale ed etico e, di conseguenza, di 'plasmare' nuove coscienze critiche e un rinnovato senso

16 A questo proposito si veda: U. Ojetti, *Alla scoperta dei letterati*, P. Pancrazi (ed.), Firenze, Le Monnier, 1946; G. Ragone, *La letteratura e il consumo: un profilo dei generi e dei modelli dell'editoria italiana (1845-1925)*, in A. Asor Rosa (ed.), *Letteratura italiana*. II. *Produzione e consumo*, Torino, Einaudi, 1983; G. Ragone, *Un secolo di libri: storia dell'editoria in Italia dall'Unità al post-moderno*, Torino, Einaudi, 1999.

17 Suo figlio Beppino nacque a Firenze il 10 marzo 1903, successivamente Bertelli divenne nuovamente padre il 2 luglio 1907, quando nacque la figlia Ida, chiamata affettuosamente dal padre Idina.

18 Sulle caratteristiche della letteratura per l'infanzia ottocentesca si vedano: A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, 2 voll., Milano, FrancoAngeli, 2017-2018.

di responsabilità civile. Non a caso Pino Boero e Carmine De Luca definiscono *Vamba* un autore «non […] facile perché ironia e disincanto si muovono nella sua produzione sullo stesso binario»[19], di fatto, la sua attività letteraria è stata costantemente caratterizzata da questo intrecciarsi tra umorismo e 'realismo', che ne ha costituito un elemento distintivo e di pregio.

Dopo *Ciondolino*, la produzione di Bertelli nell'ambito della letteratura per l'infanzia proseguì, tanto per citare le opere più significative, oltre che con l'esperienza editoriale de «Il Giornalino della Domenica», luogo principale della sperimentazione del suo progetto educativo, con la pubblicazione di *Storia d'un naso* (1906), novella in ottave, con *Il Giornalino di Gian Burrasca* (1912), i cui episodi erano già stati pubblicati a puntate su «Il Giornalino della Domenica» tra il 1907 e il 1908 e divenuto ormai un classico della letteratura giovanile, con *Le scene comiche* (1913)[20], e ancora, con *I bimbi d'Italia si chiaman Balilla: i ragazzi italiani nel Risorgimento nazionale* (1915), opera con cui l'autore esprime tutto il suo 'nazionalismo', o meglio il suo profondo amor patrio.

Attraverso la sua produzione letteraria *Vamba* fu in grado di proporre alle giovani generazioni modelli positivi, imperfetti ma reali, quindi concreti e non irraggiungibili; a questo proposito Carmela Portanova osservava:

> […] non impartì noiose lezioni di viver sociale, non esaltò i 'Pierini perbenino' coprendo di sdegnoso biasimo i 'Giulietti cattivoni', non presentò ai ragazzi perfetti (ed inutili) modelli da imitare, ma soffiò su tutto quel polverume di vecchie ideologie, lontane dalla vivida e fresca umanità del fanciullo, ed entrò, ilare e giocondo con sensibilità di artista e cuore di poeta, nel mondo dell'infanzia, per ammaestrare col sorriso, con la burletta, con la birichinata, ottenendo molto di più di quello che avevano ricavato i suoi predecessori da tutta la loro pesante saggezza[21].

Bertelli, grazie al suo animo bambino, brioso e divertente, seppe quindi costruire e organizzare un intervento pedagogico sulle nuove generazioni del Novecento, caratterizzato da un armonico equilibrio tra diletto e ideali, tra piacere e dovere; egli nutriva nei confronti dell'infanzia, e quindi del suo pubblico di bambini e adolescenti, un affetto paterno, sincero, che gli permise di riunire attorno a sé una schiera di lettori e affiliati fedeli, i quali custodirono e tramandarono per generazioni, a volte pur inconsciamente, i suoi valori e i suoi insegnamenti.

[19] Boero, De Luca, *La letteratura per l'infanzia*, cit., p. 117.

[20] *Le scene comiche*, *Storia d'un naso* e la successiva *Cronaca della settimana*, furono riunite in una collana denominata *Cinematografo poetico*, caratterizzata da una complementare fusione tra il sentimentale e il comico.

[21] Portanova, *Vamba (Luigi Bertelli)*, cit., pp. 6-7.

2. *L'esperienza editoriale de «Il Giornalino della Domenica»: le finalità educative e il percorso storiografico*

I propositi educativi di Luigi Bertelli, anticipati nelle prime opere dedicate all'infanzia e alla gioventù, trovarono la loro massima espressione nell'esperienza editoriale de «Il Giornalino della Domenica» che, nei primi anni del Novecento, rappresentò una vera e propria novità nell'ambito della stampa periodica per ragazzi[22]: rispetto alle seppur variegate testate ottocentesche, esso si proponeva di essere il fulcro e il principale strumento per la promozione di una serie di iniziative finalizzate alla diffusione di precisi ideali e valori legati, primariamente, all'amor patrio e al senso di responsabilità civile. La nuova rivista, lontana dai pedanti intenti della pedagogia dell'esempio, mirava a fornire un'educazione che fosse sì patriottica e politica, ma nella più completa articolazione dei termini, in quanto, sempre attraverso l'ironia, essa veicolava messaggi quali l'importanza del rispetto delle autorità, delle regole sociali, la necessità dello spirito di sacrificio e della solidarietà reciproca, l'etica del lavoro e, soprattutto, la promozione del bene comune[23].

Attraverso il decalogo apparso sulla copertina posteriore del primo numero del Giornalino (24 giugno 1906)[24], il direttore Luigi Bertelli ben chiariva il programma, o meglio la 'missione' della nuova testata:

> Dare tutte le domeniche al suo giovine pubblico una lettura che sia istruttiva senza stancarne l'attenzione; che sia educatrice senza esser noiosa; interessante senza troppo sforzare la immaginazione; divertente senza sguaiataggini e senza volgarità. Accendere e tener viva sempre nel cuore dei piccoli lettori la fiamma degli eterni ideali per la Patria e per la Umanità, non con la vana rettorica di frasi fatte, ma con la forza che viene dalla sincerità dell'accento di chi comunica affetti profondamente sentiti; e sopra tutto schiuder l'anima delle giovani generazioni alla religione del Dovere che affratella tutti i buoni e i giusti di tutti i tempi e di tutti i luoghi. Appagare sempre il desiderio di sapere del minuscolo pubblico intorno a uomini e cose e avvenimenti della giornata; spiegargli via via le invenzioni e le scoperte nel campo della scienza; adornare gli scritti con riproduzioni e illustrazioni che non offendano – come spesso pur troppo accade – il gusto estetico con figure mal disegnate e peggio colorate; offrire, insomma, ai nostri amati ragazzi *un giornalino vario, utile e gaio* la cui collezione

[22] Sulla stampa periodica per l'infanzia e l'adolescenza ottocentesca e di inizio Novecento, si vedano: D. Bertoni Jovine, *I periodici per giovani e ragazzi dopo l'Unità d'Italia*, in Ead., *Letteratura popolare e cultura popolare in Italia*, Firenze, La Nuova Italia, 1962, pp. 254-271; J. Meda, *Per una storia della stampa periodica per l'infanzia e la gioventù in Italia tra '800 e '900*, in F. Loparco, *I bambini e la guerra. Il Corriere dei Piccoli e il primo conflitto mondiale (1915-1918)*, Firenze, Nerbini, 2011, pp. 7-24; Ascenzi, Sani, *Storia e antologia della letteratura per l'infanzia nell'Italia dell'Ottocento*, cit., Vol. II, pp. 331-362.

[23] Sulle finalità educative de «Il Giornalino della Domenica» si veda l'interpretazione delle parole di Fanciulli, uno tra i più stretti collaboratori di Bertelli, data da Davide Montino in *Le tre Italie di Giuseppe Fanciulli: educazione e letteratura infantile nel primo Novecento*, Torino, SEI, 2009.

[24] Per una più completa lettura del programma del Giornalino, si veda anche: Vamba, *Il programma*, «Il Giornalino della Domenica», a. I, n. 1, 24 giugno 1906, pp. 1-2.

(quando essi saranno divenuti grandi) rimanga caro ricordo della loro infanzia, rinnovatore gradito di serene impressioni che ne allietarono gli anni jiovanili e di sani stimoli alla onesta operosità di una vita utile a sé e ad altrui.

Raccogliendo in parte l'eredità del «Giornale per i Bambini»[25] e – poi – del «Giornale dei fanciulli», l'innovativo settimanale, fondato e diretto dallo stesso *Vamba* ed edito da Enrico Bemporad[26], si rivolgeva principalmente alla gioventù italiana dei ceti medio-alti, o meglio a quella della borghesia urbana: il prezzo della rivista e, in genere, la qualità del prodotto suggeriscono, per l'appunto, la tipologia di pubblico, anche se è vero che, seppur in misura nettamente minore, grazie ad esempio allo zelo di alcune maestre o alle premure di qualche nonno, il Giornalino riuscì a circolare anche tra bambini di estrazione sociale diversa.

Di fatto, la rivista era nata con un progetto educativo e culturale ben preciso, volto a favorire la costruzione di un'identità nazionale salda, fondata sui valori tipici della borghesia ottocentesca, la quale passava non soltanto tramite la promozione degli ideali risorgimentali, ma anche attraverso il potenziamento del gusto estetico dei giovani lettori; per questo Bertelli scelse di avvalersi della collaborazione dei più celebri letterati, scrittori, musicisti, disegnatori e illustratori dell'epoca[27], operanti e attivi soprattutto nell'ambito della letteratura dedicata agli adulti e non in quella giovanile.

[25] Dal periodico fondato e diretto – nel primo biennio – da Ferdinando Martini, il Giornalino riprese in particolare l'attenzione alle illustrazioni e l'interesse nello stabilire una comunicazione diretta con i propri lettori, intuizione che venne poi sviluppata e organizzata attraverso le così dette *pagine rosa* e la *Corrispondenza* del Giornalino. Tale rubrica poneva in contatto diretto i lettori, *Vamba* e tutta la redazione e, ben presto, divenne il nucleo centrale dell'intera iniziativa editoriale, in grado di creare legami di amicizia, di promuovere la solidarietà e lo scambio reciproco tra i giovani, e capace di farsi strumento di connessione tra il mondo degli adulti-redattori e quello bambino degli abbonati.

[26] Enrico Bemporad aveva ereditato la casa editrice Paggi e la sua attività era già da tempo pienamente operativa e incisiva nel settore delle pubblicazioni scolastiche e della letteratura giovanile. A tal proposito si vedano: E. Bemporad, *Cinquant'anni di attività editoriale*, «L'Italia letteraria. La fiera letteraria: settimanale di scienze, lettere ed arti», a. 11, n. 47, 24 novembre 1935, p. 3; *Paggi, Bemporad, Marzocco: storia di una casa editrice*, revisione a cura di G. Semerano, Firenze, Bemporad-Marzocco, 1960; P. Tentori, *Bemporad Enrico*, in *Dizionario Biografico degli Italiani*, Roma, Istituto dell'Enciclopedia Italiana, 1966, Vol. VIII, pp. 154-155; G. Turi (ed.), *Storia dell'editoria nell'Italia contemporanea*, Firenze, Giunti, 1997; F. Bacchetti, *Bemporad Roberto & F.*, in G. Chiosso (ed.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003, pp. 65-68; C. Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento. La tradizione toscana e le nuove realtà del primo Novecento in Italia*, Firenze, Pagnini, 2004; M. Galfrè, *Il regime degli editori. Libri, scuola e fascismo*, Roma-Bari, Laterza, 2005; N. Tranfaglia, V. Albertina, *Storia degli editori italiani: dall'Unità alla fine degli anni Sessanta*, Roma, GLF editori Laterza, 2007; C.I. Salviati (ed.), *Paggi e Bemporad editori per la scuola. Libri per leggere, scrivere e far di conto*, Firenze-Milano, Giunti, 2007; *Enrico Bemporad: Autori e illustratori nel cammino di un grande editore (1889-1938)*, Firenze-Milano, Giunti, 2009; S. Assirelli, *Paradigma Bemporad. Percorsi e linee evolutive dell'illustrazione nel libro per l'infanzia in Italia tra Ottocento e Novecento*, Firenze, Edizioni Nerbini, 2012.

[27] Tanto per citarne alcuni tra i più noti, tra gli scrittori ricordiamo Luigi Capuana, Giuseppe Ernesto Nuccio, Emilio Salgari, Ida Baccini, Maria Savi Lopez, Edmondo De Amicis, Giovanni

La costituzione della redazione del Giornalino e la selezione dei collaboratori rispondevano al 'bisogno' di *Vamba* di offrire al suo giovane pubblico un'educazione che fosse sincera, autentica, che sviluppasse e incrementasse lo spirito critico, stimolando non tanto l'emulazione di modelli *pre*-stabiliti e perfetti, quanto piuttosto la curiosità e la vivacità di pensiero.

Rispetto agli altri direttori delle riviste per bambini e fanciulli dell'epoca, Bertelli era dotato di una particolare sensibilità che gli consentiva di riuscire a instaurare con i suoi lettori un contatto spontaneo, diretto, immediato, sempre veicolato dall'ironia, dall'umorismo e dal profondo rispetto reciproco; nel numero 30 del Giornalino, lo stesso *Vamba* parla di uno

> speciale affettuoso senso di intimità stabilitosi per mezzo del *Giornalino* tra quelli che lo fanno e tra quelli che lo leggono, e fra i lettori stessi. Tutti noi sentiamo di formare con tutti i nostri piccoli amici, e non a parole soltanto, una immensa famiglia in cui non v'ha distinzione di gradi di parentela… E questo resultato, indubbiamente lieto, crediamo sia dovuto più che altro alla grande schiettezza con la quale abbiamo trattato i lettori, cercando di suscitare nella loro anima, senza rettorica e senza noia, quei sensi di equilibrata italianità, di moralità sana e moderna e di coltura civile, che soli possono affratellare davvero i grandi e i piccoli in un comune ideale e in una pratica comune[28].

Nello scenario della stampa periodica per ragazzi il Giornalino diede il via a una vera e propria «rivoluzione»[29]: il giovane pubblico, che fino ad allora era stato tenuto lontano dalle questioni politiche, culturali e civili tipiche del mondo adulto, venne a pieno titolo inserito nelle discussioni 'serie' e chiamato a esprimere la propria opinione, che veniva ora tenuta in considerazione alla pari, o addirittura in misura maggiore, rispetto a quella degli adulti.

Le esigenze politiche e culturali di *Vamba* trovarono, quindi, piena espressione nell'esperienza de «Il Giornalino della Domenica», che ben si inseriva nel contesto editoriale dei primi anni del Novecento caratterizzato da un seppur lento processo di modernizzazione e di apertura verso i giovani, i quali per la prima volta furono individuati come veri e propri consumatori, e la cui attenzione doveva essere attirata in modo accattivante e originale, soprattutto nell'ambito del mercato editoriale delle pubblicazioni educative dedicate all'infanzia e alla gioventù, che ben si differenziavano da quelle prettamente scolastiche[30].

Pascoli, Ugo Fleres, Rosa Errera, Emma R. Corcos, Augusto Vittorio Vecchi, Ugo Ojetti, Grazia Deledda, Renato Fucini e Paola Lombroso Carrara; mentre tra gli illustratori ricordiamo Filiberto Scarpelli, Antonio Rubino, Umberto Brunelleschi, Ezio Anichini, Giuseppe Biasi, Bruno Angoletta, Sergio Tofano, Ugo Finozzi. Sui collaboratori del Giornalino si vedano: L. Nissim Rossi (ed.), *Le grandi firme del «Giornalino della Domenica»*, cit.; 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.

[28] *Ieri, oggi, domani*, «Il Giornalino della Domenica», a. II, n. 30, 28 luglio 1907, p. 11.

[29] Cfr. Michieli, *Vamba*, cit., pp. 89-90.

[30] Sulla stampa periodica scolastica e pedagogica di fine Ottocento e inizio Novecento, a titolo

Il percorso storiografico del Giornalino non fu, però, lineare ma subì numerose interruzioni nel corso del tempo, dovute a problematiche di diversa natura – economiche, organizzative o culturali. Per la prima volta la rivista ideata e diretta da Bertelli si trovò a dover interrompere bruscamente le proprie pubblicazioni nel luglio 1911: gli ormai dispendiosi problemi economici posero fine alla prima fase della testata, quella più significativa e autentica, caratterizzata dall'articolazione del progetto di formazione dell'identità nazionale e di educazione patriottica, che aveva raggiunto il suo apice con la creazione della *Confederazione giornalinesca*, avvenuta nel 1908[31].

Nel *Commiato* di *Vamba* pubblicato nell'ultimo numero del 1911 si legge[32]:

Vedete ragazzi: un giornale di qualunque genere, oltre a un mezzo di diffusione d'idee, è, anzi purtroppo deve essere oggi anche una impresa industriale. Un giornale che abbia un plebiscito di approvazioni ma non riesca a vendere tante copie quante gliene occorrono per bastare a sé stesso deve necessariamente morire, a meno che non vi sia chi, per suo interesse morale… o magari immorale, lo mantiene in vita a sue spese. Perciò come gli uomini muoiono si suol dire per mancanza di fiato, così i giornali muoiono sempre per mancanza di quattrini sebbene non si sia mai dato il caso, che io ricordi, di un giornale che abbia morendo candidamente confessato la vera malattia che lo uccideva.

Più avanti Bertelli aggiunge:

Così il *Giornalino* conquistò nella stampa la sua alta reputazione, – il suo successo morale fu addirittura clamoroso. Ma il successo materiale non corrispondeva… tanto che alla fine del 1908 il bilancio dell'annata si chiudeva con più di cinquanta mila lire di deficit. Il fatto di non aver fino allora raggiunto il numero di abbonati necessario a un giornale di tal natura e anche l'annunzio per l'anno prossimo di un giornalino concorrente appoggiato a un potentissimo organismo giornalistico, decise la Società editrice della quale il Bemporad è gerente a cessar le pubblicazioni del *Giornalino della Domenica*[33].

esemplificativo, si vedano: G. Genovesi, *La stampa periodica dei ragazzi. Da Cuore a Charlie Brown*, Torino, Guanda, 1972, in partic. pp. 34-45; G. Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, La Scuola, 1997; L. Braida, M. Infelise (edd.), *Libri per tutti: generi editoriali di larga circolazione tra antico regime ed età contemporanea*, Torino, UTET, 2010; G. Chiosso, *L'Italia alfabeta. Libri di testo e editoria scolastica tra Otto e primo Novecento*, in A.M. Mandich, B. Ranzani (edd.), *L'editoria italiana per le lingue: atti della giornata di Bologna, 12 gennaio 2006*, Bologna, CLUEB, 2013, e disponibile anche in *Quaderni del CIRSIL – 6 (2007)* al link <http://amsacta.unibo.it/2687/1/Chiosso.pdf> (ultimo accesso: 15.09.2020).

31 La cronaca della proclamazione ufficiale della *Confederazione giornalinesca* venne pubblicata su «Il Giornalino della Domenica», a. III, n. 26, 28 giugno 1908, pp. I-V, firmata da *Il Cronacaio*.

32 Vamba, *Commiato*, «Il Giornalino della Domenica», a. VI, n. 30, 23 luglio 1911, pp. 16-19.

33 Dopo il bilancio gravemente negativo del 1908 l'editore Bemporad decise di cessare la pubblicazione del Giornalino, ma *Vamba*, pur di non veder fallire il suo progetto educativo, decise di assumersi personalmente la responsabilità del periodico. Sempre nel *Commiato*, di fatto, si legge: «E mi venne allora un'arditissima idea: di pigliare io il *Giornalino* e continuarlo a mio rischio e pericolo… E l'idea si impossessò di me, malgrado il prudente consiglio di molti amici che me ne facevano considerare i pericoli, e sorretta dall'entusiasmo di tutti i miei compagni di lavoro, trionfò. Il sor *Enrico*, che era stato tra gli amici che me ne sconsigliavano, quand'io mi decisi ad assumere il *Giornalino*, accompagnò la cessione con ogni sorta di facilitazioni e il suo attaccamento a questo

Con il termine «giornalino concorrente», *Vamba* intende riferirsi al «Corriere dei Piccoli», il supplemento del quotidiano nazionale «Corriere della Sera» nato nel 1908 e che, in pochissimi anni, divenne il periodico per l'infanzia e la gioventù più diffuso in tutta Italia[34]. Il nuovo settimanale, diretto da Silvio Spaventa Filippi, riuscì a imporsi sul Giornalino grazie alle sue innovative caratteristiche: l'uso delle più moderne tecnologie tipografiche, gli permisero di abbassare notevolmente i costi di produzione e di distribuzione e, di conseguenza, di diffondersi rapidamente e in modo eterogeneo tra il giovane pubblico, in più, il «potentissimo organismo giornalistico» a cui era legato, gli assicurò la piena circolazione tra la borghesia italiana.

Il prezzo decisamente competitivo del *Corrierino* – come affettuosamente era stato ribattezzato dai lettori – riuscì a strappare al periodico di Bertelli non solo un buon numero di abbonati, ma anche alcuni collaboratori; è necessario puntualizzare però che la testata diretta da Spaventa Filippi nutriva, ovviamente, ambizioni ben diverse da quelle del Giornalino: gli aspetti innovativi, come l'introduzione dei fumetti (o meglio dei *comics*), importati dall'ambito editoriale statunitense, e la sua facile accessibilità, non veicolavano un dichiarato e ordinato progetto educativo e culturale, piuttosto esaltavano l'aspetto maggiormente ludico e 'leggero' dell'infanzia, caratteristiche tuttavia che lo candidavano a divenire un perfetto periodico di massa per le giovani generazioni.

A seguito della prima interruzione, le pubblicazioni de «Il Giornalino della Domenica» ripresero solo nel 1918, dopo il primo conflitto mondiale, precisamente il 22 dicembre[35]: la direzione era ancora affidata a Bertelli, ma la redazione era stata spostata a Roma, in via Gregoriana 56, poiché l'editore all'inizio di questa seconda fase fu Enrico Somigli, anche se in realtà Bemporad, seppur in modo indiretto, continuò a sostenere l'iniziativa di *Vamba*. Il formato del Giornalino rimase pressoché invariato, vennero mantenute le *pagine rosa* e molte delle tradizionali rubriche, ma venne pubblicato come quindicinale e non più come settimanale. Il periodico, ben presto, richiamò l'attenzione di 'vecchi' collaboratori e abbonati, pertanto non venne divulgato un nuovo programma, in quanto i suoi lettori erano già «belli e fatti»[36] e scelsero in maniera decisa e

buono e bel figliolo nato nella sua libreria non fu mai smentito».

34 Sul «Corriere dei Piccoli» si vedano: Faeti, *Letteratura per l'infanzia*, cit.; S. Spaventa Filippi, *Silvio Spaventa Filippi e il* Corriere dei Piccoli, Venosa, Edizioni Osanna Venosa, 1987; P. Pallottino, *Sei anni di «ottonari». Tutti i personaggi del Corriere dei Piccoli dal 1908 al 1914*, «Comics», vol. XIII, n. 39, 1977, pp. 26-31; Boero, De Luca, *La letteratura per l'infanzia*, cit.; A. Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, eum, 2009, pp. 200-206; Loparco, *I bambini e la guerra. Il Corriere dei Piccoli e il primo conflitto mondiale (1915-1918)*, cit.

35 La numerazione del Giornalino prosegue da dove si era interrotta, quindi il primo numero della 'seconda fase' è il numero 1 dell'anno VII.

36 Nell'articolo di apertura del primo numero del 1918 dal titolo *C'è bisogno di un programma?*, si legge: «Un programma è necessario ai giornali nuovi che han bisogno di richiamare l'attenzione

repentina di seguire nuovamente le pubblicazioni del Giornalino, che pur aveva pubblicizzato il suo ritorno in modo alquanto modesto tramite gli «avvisini economici dei principali giornali d'Italia (in tutti meno uno che non volle accettarlo)», con i quali aveva messo a bando un *Concorso per novelle, poesie, copertine e storielle senza parola*[37].

In questa seconda fase, due furono le questioni maggiormente affrontate da *Vamba* tra le pagine della sua testata: la prima riguardava la promozione dello spirito di associazione e aggregazione tra il giovane pubblico di lettori, veicolata soprattutto attraverso il rilancio delle famose *Feste del grillo*; la seconda, invece, si riferiva al tema dell'irredentismo. Nel corso del 1919, di fatto, Bertelli aveva deciso di appoggiare l'impresa di Fiume, guidata da Gabriele D'Annunzio, presso cui si era anche recato personalmente tra l'ottobre e il novembre dello stesso anno, accompagnato da Fanciulli; sempre a partire dal 1919, sul periodico diretto da *Vamba* si diede quindi il via ad una serie di pubblicazioni su tale questione fiumana, con l'intento di trasmettere e rilanciare temi cari all'amor patrio e il problema delle terre irredente[38].

Un'altra battuta di arresto del percorso editoriale del Giornalino ci fu nel 1920: dopo la morte di *Vamba*, avvenuta il 27 novembre, anche l'editore Somigli decise di abbandonare l'impresa e di lasciarla nelle mani degli eredi di Bertelli, ma ben presto le pubblicazioni vennero nuovamente interrotte. Con la scomparsa di *Vamba* venne ovviamente meno il cuore pulsante del Giornalino, poiché, nonostante le numerose difficoltà, la vera costante dell'intero progetto editoriale era stata rappresentata dal suo direttore che, grazie alla sua sensibilità, alla sincerità e al legame che era stato in grado di creare con generazioni di

della folla indifferente per crearsi un pubblico di lettori. Ma io, per mia speciale fortuna – come quelli che, dovendo rivestirsi e volendo sfuggire la noia delle misure e delle prove si dirigono a un magazzino di così detti *abiti confezionati* – i miei lettori me li piglio *belli e fatti*: con la differenza che i miei lettori son belli davvero e son fatti proprio pel mio dosso, tanto che (come si può vedere nei registri d'amministrazione) *mi tornano bene* che è un piacere, e non fanno una grinza… anche perché, Dio li benedica, son tutti giovani. E c'è di più e di meglio: vi sono certe lettrici ch'io trovo non solo belle e fatte, ma che, a loro volta, mi hanno fatto dei nuovi lettori, proprio nuovi nuovi che cominciano appena ora a balbettare le prime vocali con la boccuccia fragrante d'innocenza…» (Il Giornalino della Domenica, *C'è bisogno di un programma?*, «Il Giornalino della Domenica», a. VII, n. 1, 22 dicembre 1918, p. 1).

[37] *Corrispondenza*, «Il Giornalino della Domenica», a. VII, n. 1, 22 dicembre 1918, p. I.

[38] In relazione all'impresa fiumana si vedano i più noti articoli apparsi sul Giornalino: le lettere *Il Generale Ceccherini da Fiume* e quella autografa di Gabriele D'Annunzio per *Vamba*, entrambe pubblicate di seguito sulle pagine rosa de «Il Giornalino della Domenica», a. VII, n. 44, 19 ottobre 1919, pp. I-II; G. Fanciulli, *Ieri e oggi (Tornando da Trieste)*, «Il Giornalino della Domenica», a. VII, n. 48, 16 novembre 1919, pp. 1-2; F. Giunta, *L'incantesimo*, «Il Giornalino della Domenica», a. VII, n. 52, 14 dicembre 1919, pp. 3-4; G. Fanciulli, *Vamba a Fiume*, «Il Giornalino della Domenica», a. IX, n. 21, 27 novembre 1921, pp. 7-9. Sul legame tra Bertelli e la vicenda di Fiume, si vedano anche: C. Gallo, *Vamba e i ragazzi del «Giornalino della Domenica» a Fiume*, in Atti Acc. Rov. Agiati, a. 258, ser. VIII, vol. VIII, A, fascicolo I, 2008, disponibile al link <http://fll-italia.it/UploadDocs/5153_art10_gallo.pdf> (ultimo accesso: 15.09.2020); Montino, *Le tre Italie di Giuseppe Fanciulli: educazione e letteratura infantile nel primo Novecento*, cit., pp. 43-46.

lettori, era riuscito ad articolare e a realizzare una vera e propria innovazione nell'ambito della stampa periodica per l'infanzia e a promuovere valori, ideali e sentimenti politici, nazionali e culturali di raro spessore.

A seguito di questa seconda e breve fase, ne prende avvio un'altra particolarmente turbolenta e travagliata, nel corso della quale il periodico cambiò varie sedi ed editori, oltre alla direzione: venne infatti diretto dal 1921 al 1924 da Giuseppe Fanciulli, uno dei più stretti collaboratori di *Vamba*, al suo fianco fin dagli albori dell'impresa editoriale, che poi però, con il passaggio alla casa editrice Arnoldo Mondadori – voluto dagli eredi di Bertelli – fu sostituito da Guido Cantini, direttore dei periodici Mondadori. Tuttavia, la nuova casa editrice modificò sensibilmente la natura della testata e, nel corso del 1926, la famiglia Bertelli decise di separarsi dal nuovo progetto e di tornare al formato più tradizionale.

Il 1927 costituì l'ultimo e sofferto anno di vita de «Il Giornalino della Domenica». Dopo esser stato per lungo tempo luogo di formazione delle coscienze etico-civili delle giovani generazioni e palestra privilegiata per alcuni tra i più autorevoli scrittori italiani, il periodico fondato da Bertelli concluse definitivamente le sue pubblicazioni; purtroppo poi, a causa di vicende politico-culturali successive che interferirono sulla 'fama' e sulla 'autorità' del Giornalino, *Vamba* e il suo progetto editoriale vennero a lungo e ingiustamente sottostimati o addirittura dimenticati dalla letteratura critica, pur costituendo in realtà un *unicum* irripetibile della storia letteraria italiana dedicata all'infanzia e alla gioventù[39].

3. Vamba *e le nuove prospettive di ricerca*

A partire dal Novecento in Italia, l'evolversi di una nuova sensibilità nei confronti dell'infanzia implicò necessariamente una trasformazione dell'atteggiamento degli adulti verso le giovani generazioni e una maggiore attenzione a quelle che erano le dinamiche evolutive e di sviluppo dei loro bisogni sociali e dei loro interessi culturali; di conseguenza, parimenti si modificò il valore assunto da alcuni importanti processi e fenomeni educativi rivolti all'infanzia e alla gioventù.

[39] Per un'analisi più approfondita delle varie fasi di pubblicazione del Giornalino si vedano: Michieli, *Vamba*, cit.; C. Gallo, *Vita, morte, miracoli e resurrezione del «Giornalino della Domenica»: da Bemporad a Mondadori (1906-1927)*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, Milano, FrancoAngeli, 2004, pp. 317-338; Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, cit., pp. 181-217.

In linea con le più recenti prospettive di ricerca storico-pedagogica e della letteratura per l'infanzia[40], che attribuiscono sempre maggior rilievo all'analisi del dibattito sul tema dell'educazione civile e del disciplinamento sociale in ambito storico-educativo, anche la produzione letteraria e l'operato di *Vamba* possono essere analizzati e *re*-interpretati secondo nuove chiavi di lettura e spunti di riflessione. Numerose e significative sono, infatti, le tematiche e le questioni sollevate da Bertelli nel corso della sua carriera di giornalista e scrittore, prime fra tutte la critica alla classe politica di fine Ottocento e la necessità di formare le coscienze etico-civili delle nuove generazioni di italiani secondo gli ideali tipici del Risorgimento e le tradizionali idee mazziniane; elementi, questi, che caratterizzarono in modo peculiare tutta la sua produzione, dai primi *pupazzetti* satirici agli ultimi numeri de «Il Giornalino della Domenica», e che possono essere oggi studiati e approfonditi alla luce dell'attuale attenzione rivolta ai processi di formazione dell'identità nazionale.

Vamba apparteneva alla così detta «generazione di mezzo», ovvero a quella generazione di passaggio tra chi aveva contribuito direttamente all'unificazione nazionale e chi avrebbe poi completato il processo, attraverso la conquista delle terre irredente; lui stesso nel 1906 scriveva:

> Chi sta peggio siamo noi, nati troppo tardi e troppo presto per far qualcosa; noi che comparimmo alla luce mentre i nostri bravi babbi si battevano per far l'Italia, noi che spariremo nell'ombra quando i nostri bravi figli si batteranno per completarla… Pazienza! E cerchiamo almeno di far una cosa: ricordare i nostri babbi che si batterono ai figli che si batteranno, consegnando all'Avvenire pieno di speranza, sempre accesa la fiaccola sacra dell'Ideale che alle nostre mani affidò il Passato pieno di gloria[41].

La vocazione educativa di Bertelli derivava, quindi, da una sua intima e personale esigenza d'azione sul contesto socio-politico della penisola: *Vamba* scelse di intervenire sulla formazione delle coscienze civili, sul senso di responsabilità e sullo sviluppo degli ideali delle giovani generazioni, soprattutto per far sì che la futura classe dirigente non commettesse gli errori del passato e per 'plasmare' una società accomunata dall'amor patrio e dalla 'venerazione' nei confronti dei Padri della patria, dalla solidarietà e da un patrimonio culturale condiviso.

[40] Sullo sviluppo della ricerca storico-educativa nell'ambito della letteratura per l'infanzia, si vedano: A. Ascenzi (ed.), *La letteratura per l'infanzia oggi. Questioni epistemologiche, metodologie d'indagine e prospettive di ricerca*, Milano, Vita e Pensiero, 2002; F. Bacchetti, *La letteratura per l'infanzia*, in C. Betti, G. Di Bello, F. Bacchetti, G. Bandini, U. Cattabrini, P. Causarano, *Percorsi storici della formazione*, Milano, Apogeo, 2009, pp. 121-135; M. Bernardi, *Letteratura per l'infanzia e alterità: incanti, disincanti, ambiguità, tracce*, Milano, FrancoAngeli, 2016; L. Cantatore, S. Barsotti (edd.), *Letteratura per l'infanzia: forme, temi e simboli del contemporaneo*, Roma, Carocci, 2019.

[41] Vamba, *XX settembre*, «Il Giornalino della Domenica», a. I, n. 13, 16 settembre 1906, p. 1. L'articolo firmato da *Vamba* era stato scritto per commemorare la Breccia di Porta Pia e la liberazione di Roma.

Facendo riferimento nello specifico all'esperienza de «Il Giornalino della Domenica», il rinnovato approccio metodologico della ricerca storico-educativa consente di analizzare il progetto di costruzione dell'identità nazionale auspicato da *Vamba* attraverso nuovi orientamenti epistemologici, e di valorizzarlo nello scenario della stampa periodica per ragazzi del Novecento. Accanto alle tradizionali linee di ricerca che si propongono di indagare, per esempio, il 'gusto del bello' e la qualità delle illustrazioni apparse nel periodico o, ancora, lo scambio epistolare intercorso tra i lettori e la redazione[42], meritano, quindi, di essere approfondite altre tematiche finora poco valorizzate o per nulla considerate, che hanno, invece, caratterizzato e connotato l'iniziativa editoriale di Bertelli, rendendola quell'*unicum* letterario di cui, purtroppo, ancora oggi troppo poco si parla.

Il processo di educazione nazionale voluto da *Vamba* raggiunse sicuramente il suo apice con la nascita della *Confederazione giornalinesca* (1908)[43], ovvero quella che si potrebbe definire come il principale luogo di aggregazione degli abbonati del Giornalino, attorno al quale si costituì lo «Stato balocco» con cui lo stesso Bertelli cercò di avvicinare le giovani generazioni alle responsabilità civili e politiche, e con cui tentò di potenziare lo sviluppo di attività e associazioni parascolastiche. Numerose e diversificate furono, di fatto, le istituzioni nate a seguito del Giornalino e della *Confederazione*, tra cui meritano di essere citate le leghe – dei Golosi, filatelica, degli Enigmisti, fotografica, ecc. – e l'AIDAI, ovvero l'Associazione indissolubile di anime italiane; tutte queste iniziative unirono in

[42] A titolo esemplificativo su tali ambiti di ricerca si vedano: Ascenzi, *Lettere a Vamba. «Il Giornalino della Domenica» nei rapporti epistolari tra Luigi Bertelli e i suoi collaboratori*, cit.; P. Pallottino (ed.), *L'irripetibile stagione de «Il Giornalino della Domenica»*, Bologna, Bononia University press, 2008; Ascenzi, Di Felice, Tumino (edd.), *«Santa Giovinezza!». Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, cit.; 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; A. Greco, *Il «Fiammifero» di Vamba. Un disegno ritrovato: primi appunti di ricerca*, «History of Education & Children's Literature», vol. VIII, n. 1, 2013, pp. 727-731; 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.

[43] La cronaca della proclamazione della *Confederazione giornalinesca* pubblicata da *Il Cronacaio* su «Il Giornalino della Domenica», a. III, n. 26, 28 giugno 1908, pp. I-V, riporta la descrizione della seduta inaugurale, del Parlamento, il discorso del Presidente, la relazione sull'esercito Scarpelliano, la formazione del Governo, i primi atti e le elezioni generali, la nomina di Senatori, delle Prefetture e delle Sottoprefetture, infine, le ultime notizie e l'impressione nel Paese. Sulla *Confederazione giornalinesca* si vedano poi soprattutto: 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; 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.

modo indissolubile generazioni di bambini e bambine e, per decenni, si fecero strumento di propaganda di valori e ideali liberali, democratici e civili[44].

In realtà, fin dalla nascita del Giornalino, *Vamba* aveva ben delineato un chiaro progetto di mobilitazione giovanile e di educazione alla cittadinanza che si snodava tra le pagine del periodico grazie alle sue rubriche e ai testi in esso pubblicati, il cui assetto, infatti, non era per nulla casuale. Di fatto, accanto alle rubriche di carattere maggiormente scientifico come *Scienza gaia*, o a quelle prettamente narrative, come le *Pistole di Omero* – composte da Ermenegildo Pistelli, noto con lo pseudonimo di *Omero Redi* –, ve ne erano altre che fungevano da vero e proprio strumento di coesione e di associazione tra i vari lettori e abbonati, prima fra tutte la *Corrispondenza*, di cui fu a lungo responsabile Aldo Valori (*Ceralacca*), o i referendum, con i quali si interrogavano direttamente i lettori chiedendo loro un sincero parere sulle questioni più disparate[45].

L'instaurarsi di un rapporto diretto e leale con il pubblico della testata aveva permesso di avviare tra i lettori stessi e la redazione un dibattito e un confronto animato e sincero su tematiche rilevanti dal punto di vista nazionale, morale, sociale, etico e civile. In questa realtà democratica creata da Bertelli, l'infanzia e la gioventù si sentivano realmente accolte, comprese e ascoltate; attraverso le pagine del Giornalino i bambini avevano voce ed erano in grado di prendere consapevolezza delle proprie responsabilità e, quindi, di riuscire a maturare e a formare le loro coscienze e i loro caratteri.

L'analisi organica delle rubriche, degli articoli e dei supplementi del Giornalino consente, inoltre, di porre in luce e di approfondire altre tematiche rilevanti dal punto di vista storico-educativo, che connotano in modo peculiare l'esperienza de «Il Giornalino della Domenica», basti pensare alla questione di genere o al concetto di spiritualità in *Vamba*[46], questioni anche queste che gravitano, seppur in maniera 'accessoria', attorno al processo principale di costruzione dell'identità nazionale e di formazione delle coscienze civili delle giovani generazioni.

[44] Al termine delle pubblicazioni del Giornalino, alcune importanti iniziative e associazioni furono comunque portate avanti da molti ex abbonati, che confluirono prima nel «Lumino da notte» di *Fra Bombarda*, ovvero Aurelio Romoli, curatore della rubrica *A tempo avanzato* – divenuta in seguito *Il Cantuccio degli enigmisti* –, e poi, dopo varie vicende, nel «Girotondo», ultima iniziativa editoriale che, nello spirito del ricordo di *Vamba*, cercò di mantenere vivo il senso di aggregazione e il legame sincero che aveva unito generazioni di *grilli* dell'antico Giornalino.

[45] Un esempio di referendum proposto nel Giornalino fu quello promosso nel corso del 1907 da Gina Pieraccini, dal titolo *Acqua o vino?*, con il quale veniva chiesto ai lettori di interrogarsi sul consumo di vino nell'infanzia e, quindi, di porre in evidenza pregi e difetti degli astemi e dei così detti 'bevitori di vino'.

[46] Nella produzione di Luigi Bertelli il tema della spiritualità è ancora piuttosto ambiguo: pur non essendoci chiari riferimenti a posizioni politiche precise o a un credo religioso in particolare, non si può affermare che una certa spiritualità sia del tutto assente, ma, nel complesso, essa si connota ancora una volta sulla scia degli ideali mazziniani e risorgimentali e si basa su un approccio all'infanzia sincero, sensibile e rispettoso.

Per la prima volta nel corso del Novecento, una testata dedicata all'infanzia e alla gioventù si rivolgeva in maniera indifferente a 'bambini' e 'bambine', si preoccupava, in egual misura, dei bisogni educativi, dei gusti letterari, artistici e musicali di entrambi i generi e, addirittura, uno dei supplementi nati al suo seguito, veniva pubblicato in modo specifico ed esclusivo per le bambine[47]. Tutto il pubblico del Giornalino, maschi e femmine comprese, si sentiva pienamente accolto e incluso in una iniziativa che li vedeva protagonisti e che li rendeva parte integrante di un organo collettivo[48], caratterizzato da una forte identità, delineata sulla base dei valori tipici dell'alta borghesia urbana, sulla sincerità e sulla solidarietà reciproca, senza alcuna differenza di genere o sociale, e senza alcun pregiudizio nei confronti dell'infanzia e dell'adolescenza.

In conclusione, le nuove prospettive di ricerca legate alla produzione per l'infanzia di Bertelli, ci mostrano come il suo intento educativo seppe associarsi in modo indissolubile all'azione: le «passioni civili» del giovane pubblico furono stimolate attraverso l'uso di alcuni semplici espedienti, come la stimolazione dell'ambizione – tramite concorsi letterari, fotografici, di composizione e sfide enigmistiche – o con domande provocatorie; in questo modo però, sempre con ironia, *Vamba* riuscì anche a incentivare la curiosità, l'impegno e la dedizione nei confronti dell'educazione e della formazione civile e culturale di fanciulli e fanciulle, che altrimenti si sarebbero 'assopiti' a causa delle pedanti lezioni moraleggianti e didascaliche offerte dall'ambiente scolastico[49].

Nelle 'generazioni giornalinesche' l'impegno politico e sociale, lontano dalle posizioni di partito, la solidarietà reciproca e gli interessi culturali rappresentarono un vero e proprio strumento di 'emancipazione' dell'infanzia e della gioventù e, ben presto, si trasformarono in caratteristiche collettive, qualificanti una comunità di lettori legati in modo indissolubile dalla condivisione di ideali e sentimenti nazionali comuni.

[47] Si tratta di «Manine d'oro», una rivista mensile di lavori femminili diretta da Giacinta Romanelli Marone, autrice tra l'altro del testo «Le trine e i fuselli» del 1902 e una tra le massime esperte in materia in Italia. Questo supplemento venne pubblicato tra l'inizio e la fine del 1908, quando tra le pagine del Giornalino si annunciò che, grazie al successo riscosso, la rivista sarebbe divenuta autonoma per il 1909.

[48] Fanciulli definiva il pubblico del Giornalino come un «popolo in marcia» e ben riconosceva l'influenza e l'ammirazione esercitata da Bertelli sui propri lettori: «I ragazzi lo intesero pienamente, e lo ripagarono con un entusiastico affetto. De Amicis è stato certo popolarissimo, e amato; ma puramente come scrittore. Vamba esercitò un fascino personale e singolarissimo sul suo popolo; poiché i lettori sparsi in ogni angolo d'Italia, gli abbonati del nostro *Giornalino*, sentivano veramente di essere un popolo in marcia, e riconoscevano in lui un capo. Forse è questo un fenomeno unico nella storia della letteratura per l'infanzia» (G. Fanciulli, E. Monaci, *La letteratura per l'infanzia*, Torino-Milano-Genova-Parma-Catania, SEI, 1928, p. 282).

[49] Cfr. Rosadi, *In Memoria di Luigi Bertelli (Vamba)*, cit., pp. 11-13.

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L'evoluzione del fenomeno migratorio in Europa e le indicazioni delle istituzioni europee in merito all'educazione e all'istruzione dei figli dei lavoratori immigrati. Una rilettura storica

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The evolution of the migratory phenomenon in Europe and the indications of the European institutions regarding the education and training of the children of immigrant workers. A historical interpretation

ABSTRACT: Since the second half of the twentieth century, Europe has had to cope with the arrival of a considerable wave of immigrants seeking above all a job. In the following decades, this phenomenon has not only progressively grown, but has also taken on an entity of greater stability and irreversibility. If originally, in fact, the immigrant population was basically made up of individuals looking for a job and with the prospect of a temporary stay in the host country, later, the new physiognomy assumed by the migratory flows has translated into family reunification, requests for political asylum and, for the most part, in illegal immigration. The appearance of entire families and, consequently, of many foreign minors of school age has implied for the host countries the need to redefine the social integration policies adopted up to that moment and to ensure the right to study and inclusion of these children in national school systems. In this regard, in this work we have tried to highlight the attention shown by European political institutions in favoring school integration and the right to study of immigrant pupils.

EET/TEE KEYWORDS: Migration flows; Integration; European school systems; Immigrant pupils; Europe; XXth Century.

Introduzione

Com'è noto, fin dall'adozione della *Convenzione Culturale Europea* del 1954, il dialogo tra le culture ha rappresentato una delle peculiarità dell'integrazione europea e il mutuo rispetto e la tolleranza tra i popoli hanno costituito alcuni dei principi fondamentali sui quali si è basato il processo di coesione dei paesi del vecchio continente[1].

Negli ultimi decenni, la progressiva consapevolezza dei crescenti mutamenti globali e della maggiore interdipendenza tra i popoli ha indotto molte organizzazioni internazionali – quali, tra le più importanti, le Nazioni Unite, l'UNESCO, il Consiglio d'Europa, l'OSCE (Organizzazione per la Sicurezza e la Cooperazione in Europa) – ad avviare una cooperazione internazionale volta ad offrire risposte efficaci e sistematiche al cambiamento e a sostenere l'educazione e l'istruzione dei figli dei lavoratori immigrati, nonché la più ampia diffusione dell'educazione interculturale nelle scuole dei diversi paesi. A questo proposito, nel corso degli anni, sono state elaborate ed attuate numerose Convenzioni e Dichiarazioni internazionali contenenti «suggerimenti, raccomandazioni e direttive per l'ideazione e la realizzazione di programmi specializzati, relativi all'educazione interculturale, quali risposte educative adeguate a raccogliere le sfide del mondo attuale». Queste Convenzioni e Dichiarazioni «riflettono una salda fiducia nel potenziale educativo della scuola e contengono appelli eccezionali rivolti a una cittadinanza interculturale in cui esistano i valori e i principi che costituiscono le basi di un mondo in cui la cooperazione tra uguali, in termini di diritti e di dignità, possa tradursi finalmente in realtà»[2].

L'evoluzione del fenomeno migratorio in Europa nel corso del Novecento

Allo scopo di comprendere più chiaramente l'evoluzione del fenomeno migratorio in Europa e i profondi mutamenti strutturali che hanno portato

[1] La *Convenzione Culturale Europea* fu firmata dai Paesi membri del Consiglio d'Europa, a Parigi, il 19 dicembre 1954 ed entrò in vigore il 5 maggio del 1995. L'obiettivo primario era «lo sviluppo di una reciproca comprensione tra i popoli europei e un reciproco apprezzamento delle diversità culturali, la salvaguardia della cultura europea, la promozione di contributi nazionali ad un patrimonio culturale comune dell'Europa nel rispetto degli stessi valori fondamentali, incoraggiando, in particolare, lo studio delle lingue, della storia e della civiltà delle Parti della Convenzione. La Convenzione contribuisce ad un'azione concertata incoraggiando attività culturali di interesse europeo». Per un approfondimento della stessa si veda: *Convenzione culturale europea* (STE n° 18) in <http://conventions.coe.int/Treaty/ita/Summaries/Html/018.htm> (ultimo accesso: 11.05.2020).

[2] Centro Nord-Sud del Consiglio d'Europa, *Linee guida per l'educazione interculturale. Concetti e metodologie in materia di educazione interculturale ad uso di educatori e responsabili politici*, Lisbona, Centro Nord-Sud del Consiglio d'Europa2008, pp. 74-75.

questa ultima a diventare, nel corso di pochi decenni, un continente a tutti gli effetti multietnico e multiculturale, ci sembra opportuno ripercorrere, sia pure brevemente, le tappe di tale evoluzione e dare uno sguardo alle politiche d'integrazione promosse dagli stati membri dell'Unione in materia d'immigrazione. Com'è noto, se in Italia il fenomeno ha raggiunto livelli significativi soltanto negli ultimi decenni, in altre nazioni ha affondato le sue radici in tempi molto più lontani. Al riguardo, basti pensare a paesi come la Francia, la Gran Bretagna, la Germania, la Spagna e la Svizzera, i quali registrano, ancora oggi, il maggior numero di immigrati[3].

Per capire appieno l'evoluzione del fenomeno in questi paesi è necessario fare una sorta di separazione cronologica tra le politiche adottate dagli stessi dal secondo dopoguerra agli inizi degli anni Settanta e quelle messe in atto dagli anni Settanta in poi.

In particolare, l'ondata migratoria verso l'Europa appare contrassegnata da tre fasi specifiche[4]: una prima fase che parte dal 1945 ed è caratterizzata dalla ricostruzione post-bellica e dalla conseguente esigenza di forza lavoro[5]; una seconda fase che riguarda gli anni Settanta e si contraddistingue per la famosa crisi petrolifera che, a partire del 1973, ebbe pesanti ripercussioni negative nella produzione industriale di tutti i paesi europei[6] e provocò una significativa saturazione dei mercati e, di conseguenza, anche una drastica diminuzione della necessità di forza lavoro esterna; infine, una terza fase che parte dal 1980 e rileva una ripresa delle economie capitalistiche e un notevole aumento del fenomeno migratorio.

Per quel che concerne la prima fase, ossia quella che parte dal secondo dopoguerra, c'è da dire che in questo periodo le migrazioni si rivelano necessarie e rispondono ad una reale domanda di lavoro dei paesi dell'Europa centro-settentrionale. Al riguardo, vale la pena di precisare che i sistemi di accoglienza adottati non erano dettati da particolari sentimenti di altruismo nei confronti dei lavoratori dei paesi più poveri, ma dalle impellenti esigenze dei paesi più ricchi di procurarsi mano d'opera specializzata a basso costo che, se inizialmente – ossia, alla fine della Guerra – ebbe lo scopo di supplire alla mancanza di forza lavoro interna e aiutò i singoli paesi ad avviare la ripresa economica, successivamente – con il rapido espandersi della crescita economica –, servì a sopperire alla carenza di mano d'opera specializzata in determinati settori.

[3] Eurostat, *Statistiche sulle migrazioni internazionali e sulle popolazioni di origine straniera*, Dati estratti a maggio 2020, in <http://ec.europa.eu/eurostat/statistics-explained/index.php/Migration_and_migrant_population_statistics/it> (ultimo accesso: 15.06.2020).

[4] S. Collinson, *Le migrazioni internazionali e l'Europa*, Bologna, il Mulino, 1994, p. 98.

[5] Si veda in particolare N. Nugent, *Governo e politiche dell'Unione europea. Storia e teorie dell'integrazione*, Bologna, il Mulino, 2008.

[6] C.F. Casula, *Le migrazioni nel mondo contemporaneo. Un paradosso della modernità*, in D. Santarone (ed.), *Educare diversamente. Migrazioni, differenze, intercultura*, Roma, Armando, 2006, pp. 65-80.

In questo periodo, i flussi migratori interessarono principalmente taluni stati come la Francia, la Svizzera, il Belgio, la Repubblica Federale Tedesca e la Svezia, i quali accoglievano immigrati provenienti dai paesi vicini più poveri, ossia, dal Nord Africa e dalla Turchia, nonché la Gran Bretagna che, invece, ospitava coloro che provenivano dalle ex-colonie, dall'India, dal Pakistan e dalla Giamaica. Successivamente, tale fenomeno interessò anche i paesi dell'Europa del Nord, i Paesi Bassi, la Norvegia e la Danimarca, che un tempo si erano caratterizzati soprattutto come esportatori di manodopera[7].

Su questo versante è importante rilevare che se da un lato l'esigenza di manodopera esterna indusse i paesi ospitanti ad adottare delle politiche di accoglienza e di assistenza volte ad incentivare l'immigrazione e a semplificare le tipiche formalità burocratiche legate all'ingresso degli immigrati nei propri territori, dall'altro, la propensione dei governi a sfruttare il più possibile e a basso costo la forza lavoro e, nel contempo, a scoraggiare l'inserimento e la permanenza a lungo termine dei migranti – soprattutto, attraverso il ricorso a politiche restrittive nei confronti dei ricongiungimenti familiari –, comportò il delinearsi di un tipo di immigrazione tipicamente al maschile e con tassi molto elevati di *turn over*.

A livello comunitario, in questi anni iniziò a farsi strada l'idea di realizzare un mercato comune europeo destinato ad avviare un processo di avvicinamento delle politiche economiche e d'integrazione degli stati membri, una maggiore stabilità e una più stretta collaborazione tra i paesi dell'Unione. A questo proposito, nel marzo 1957 furono firmati i famosi *Trattati di Roma* – che istituivano rispettivamente: il primo la Comunità Economica Europea (CEE) e il secondo la Comunità europea dell'energia atomica, meglio conosciuta come Euratom –, che entrarono in vigore il 1° gennaio 1958.

Con il Trattato CEE, la Francia, la Germania, l'Italia e i paesi del Benelux si riunirono in una Comunità avente lo scopo di assicurare l'integrazione attraverso gli scambi in vista dell'espansione economica e della costituzione di un mercato comune. Il principio su cui doveva basarsi il mercato comune era quello delle "quattro libertà": libera circolazione delle persone, dei servizi, delle merci e dei capitali. Esso, inoltre, si caratterizzava come uno spazio economico unificato volto a consentire la libera concorrenza tra le imprese e a porre le basi per garantire le condizioni di scambio dei prodotti e di quei servizi non contemplati dagli altri trattati (CECA e Euratom)[8].

[7] M. Fiorucci, *La mediazione culturale. Strategie per l'incontro*, Roma, Armando, 2007, p. 16. Al riguardo, si veda anche S. Gindro, U. Melotti, *Il mondo delle diversità*, Roma, Psicanalisi Contro, 1991, p. 33.

[8] Per una lettura più approfondita si veda *Europa – Il portale dell'Unione Europea*, in <http://europa.eu/index_it.htm>. Tale Trattato, fu ratificato con la Legge 14 ottobre 1957, n. 1203, concernente: *Ratifica ed esecuzione dei seguenti Accordi Internazionali, firmati a Roma il 25 marzo 1957: a) Trattato che istituisce la Comunità Europea dell'energia atomica ed atti allegati; b) Trattato che istituisce la Comunità Economica Europea ed atti allegati; c) Convenzione relativa*

A partire dai primi anni Settanta, allorché il verificarsi di un lungo periodo di recessione economica comportò una forte saturazione dei mercati[9] e, di conseguenza, una significativa diminuzione della necessità di assimilare altra forza lavoro, i vari governi, preoccupati probabilmente delle possibili conseguenze della crisi e, soprattutto, consapevoli dell'esigenza di assicurare, *in primis*, un impiego alle popolazioni di origine ritennero opportuno abbandonare le precedenti politiche sugli ingressi, sostituendole con politiche decisamente più rigorose[10].

In questi anni, peraltro, si verificò un improvviso sconvolgimento dei tradizionali schemi migratori. A differenza, infatti, dei decenni precedenti, che, come si è visto, erano stati caratterizzati da politiche di accoglienza meramente opportunistiche – ossia dettate esclusivamente dalla necessità di reperire forza lavoro e, di conseguenza, interessate a scoraggiare l'integrazione dei lavoratori stranieri rimpiazzandoli continuamente e impedendo i ricongiungimenti familiari – a partire dagli anni Settanta i governi di molti paesi ospitanti, consapevoli della necessità di frenare l'incessante e indiscriminato ingresso di persone straniere e dell'esigenza di trovare una soluzione agli inevitabili problemi di convivenza tra etnie diverse, iniziarono ad accordare i permessi di soggiorno e a promuovere dei programmi di integrazione soltanto per quegli immigrati più qualificati e per le loro famiglie.

In questo periodo, inoltre, relativamente al processo migratorio iniziò a svilupparsi un ampio dibattito politico che finì per assumere le caratteristiche di una questione di ordine pubblico ed ebbe notevoli ripercussioni anche sull'opinione pubblica, sempre più orientata a percepire tale fenomeno come una "invasione di massa" e, dunque, come un problema da risolvere e, soprattutto, come un processo da bloccare.

All'origine di tale dibattito vi fu, indubbiamente, la preoccupazione per la nuova fisionomia assunta dai flussi migratori determinati soprattutto dalle forze espulsive dei paesi d'origine – ma anche da altri fattori, quali la crisi economica e l'acuirsi delle politiche repressive in molti paesi dell'America Latina, dell'Africa, dell'Asia meridionale e dell'Estremo Oriente, destinati a subire ripetuti colpi di

ad alcune istituzioni comuni alle Comunità Europee, pubblicata nel Supplemento Ordinario alla «Gazzetta Ufficiale» n. 317 del 23 dicembre 1957 e, in seguito, con la Legge 23 dicembre 1986, n. 909, pubblicata nella «Gazzetta Ufficiale» n. 300 del 29 dicembre 1986 - Supplemento Ordinario. In seguito, tale documento subì numerose modifiche attraverso successivi trattati firmati dai paesi membri. Tra questi ci sembra opportuno ricordare: il *Trattato di Maastricht* del 1992, con il quale la CEE diventa la Comunità europea, che esprime la volontà degli stati membri di ampliare le competenze comunitarie a settori non economici, e il *Trattato di Lisbona* del 13 dicembre 2007.

[9] E. Pugliese, *L'Italia tra migrazioni internazionali e migrazioni interne*, Bologna, il Mulino, 2002, p. 74.

[10] U. Mattei, *Ai confini della terra promessa. Immigrazione, povertà, razzismo e limiti del diritto*, «Foro Italiano», Parte V, 1992, pp. 458-461.

Stato e, come conseguenza, violente dittature – e non più dai fattori produttivi del capitalismo industriale[11].

Tale situazione, indusse i governi dei paesi dell'Europa settentrionale a sostituire le precedenti politiche di *laissez-faire* – orientate, essenzialmente, ad affidare il controllo del fenomeno migratorio agli organismi amministrativi e imprenditoriali – con una linea politica più restrittiva in merito alla regolazione dei flussi. Queste limitazioni, tuttavia, non produssero l'auspicato ridimensionamento dei flussi migratori, i quali finirono per tradursi in ricongiungimenti familiari, richieste di asilo politico e, per buona parte, in immigrazione clandestina. In sostanza, una simile politica se da un lato favorì notevolmente le condizioni sociali dei lavoratori stranieri regolari e dei loro nuclei familiari, dall'altro rappresentò un duro colpo per tutti quegli immigrati privi di una particolare qualifica, i quali furono costretti a cercare dei modi alternativi per poter entrare in Europa.

Verso la fine degli anni Settanta si assiste, peraltro, ad una ripresa delle economie capitalistiche e, per converso, ad una rilevante crisi globale dei paesi sottosviluppati che provoca un significativo ampliamento del fenomeno migratorio, destinato ad espandersi anche a paesi come l'Italia, la Spagna e il Portogallo[12] i quali, per lungo tempo, pur caratterizzandosi come paesi di emigrazione, avevano dovuto fare i conti con significative migrazioni interne rispondenti, sostanzialmente, alla stessa logica delle migrazioni internazionali.

A partire dagli anni Ottanta si assiste al verificarsi di un'ulteriore correlazione tra le politiche migratorie adottate dagli stati europei i quali, tuttavia, se da un lato continuavano a mantenere una linea comune restrittiva in merito agli ingressi, che si esplicava attraverso una comune programmazione dei flussi e delle procedure per gli accessi e una serie di misure collegiali per incentivare il rientro volontario nei paesi di origine; dall'altro iniziavano a prendere coscienza del carattere strutturale che stava assumendo il fenomeno migratorio – anche in virtù del progressivo aumento dei ricongiungimenti familiari – e, dunque, della necessità di iniziare a favorire l'integrazione degli stranieri attraverso il

11 U. Melotti, *Migrazioni internazionali e integrazione sociale: il caso italiano e le esperienze europee*, in M. Delle Donne, U. Melotti, S. Petilli, *Immigrazione in Europa. Solidarietà e conflitto,* Roma, Cediss, 1993, pp. 32-34.

12 In merito a questi ultimi Stati dell'Europa meridionale, ci sembra importante rilevare che le misure restrittive assunte dalle Nazioni del Nord Europa per contrastare ulteriori ingressi, più che promuovere il processo migratorio in questi paesi, contribuirono, ad intensificarlo, infatti, come sostengono A Colombo e G. Sciortino, in simili paesi tale fenomeno, non era del tutto assente, appariva semplicemente molto più esiguo rispetto ad altri paesi. A conferma di ciò basterebbe pensare alle numerose minoranze etniche stanziate in Italia già da diversi secoli. Cfr. A Colombo, G. Sciortino, *Gli immigrati in Italia*, Bologna, il Mulino, 2004, pp. 15-16. In particolare, secondo tali studiosi non è vero che «l'inizio dell'immigrazione verso l'Italia sia dovuto alla scelta degli altri paesi europei tradizionali importatori di manodopera di introdurre, nei primi anni '70, politiche restrittive. […] l'immigrazione in Italia ha avuto inizio ben prima che tali misure restrittive venissero introdotte, e il blocco migratorio introdotto dai paesi dell'Europa settentrionale può (forse) avere intensificato il processo ma sicuramente non lo ha creato».

riconoscimento dei diritti di partecipazione politica e sociale agli immigrati di lunga permanenza o di seconda generazione.

Nel 1984, il Parlamento Europeo approvò il progetto del Trattato sull'Unione Europea, il quale ebbe il merito di avviare il processo di riforma delle istituzioni europee che avrebbe condotto, nel 1986, alla firma dell'Atto Unico Europeo (AUE)[13]. Con tale Atto, la realizzazione del mercato interno diveniva ufficialmente un obiettivo della CEE.

Nel complesso, l'istituzione dell'Unione Europea avviò una nuova fase della storia del nostro continente e si configurò come un momento decisamente significativo per il futuro dell'Europa. Stessa cosa possiamo dire della costituzione dell'Unione economica e monetaria (Uem), la quale rappresentò anch'essa un grandissimo risultato per i paesi firmatari. A conferma di ciò, basti pensare all'interesse che suscitò la neo-costituita Unione in quei paesi che fino a quel momento erano rimasti volutamente ai margini della Comunità, come l'Austria, la Svezia e la Finlandia, i quali, già nel 1995, dopo aver espletato le necessarie procedure di adesione, entreranno a farne parte[14].

All'inizio degli anni Novanta, la contestualità tra l'acuirsi del fenomeno migratorio e il completamento del processo di unificazione europea volto a stabilire, fra l'altro, la libera circolazione delle persone all'interno della Comunità, pose in risalto la questione dell'eterogeneità delle politiche migratorie europee e del trasferimento dei controlli sugli ingressi dalle frontiere nazionali alle frontiere esterne dell'Europa.

In questa fase il fenomeno migratorio diventa veramente un fatto globale, poiché assume una dimensione mondiale. È proprio a partire da questo periodo che il processo di globalizzazione inizia a diffondersi in molti settori della vita quotidiana e assume le caratteristiche di un evento dinamico, poiché la dimensione globale si intreccia con quella locale dando vita alla nuova realtà del "glocale", intesa come una realtà radicata nella dimensione locale, ma, al contempo, proiettata verso una dimensione planetaria che crea le basi per una convivenza che supera le distanze.

In tale contesto, la globalizzazione cambia il modo di percepire le distanze e i confini esistenti e apre la strada ad un processo di "transnazionalizzazione" che prevale sulla dimensione nazionale[15].

In sostanza, tale processo supera il concetto degli Stati nazionali, i quali «non vengono più concepiti solo in una prospettiva internazionale», giacché «nasce qualcosa di nuovo, uno spazio intermedio che non può più essere ricondotto nelle vecchie categorie»[16].

13 D. Preda, *Alle radici del dibattito costituente europeo: progetti, aspirazioni, sconfitte*, «Il federalista», vol. XLV, n. 1, 2003, p. 11.

14 U. Melotti, *La comunitarizzazione delle politiche d'immigrazione a dieci anni da Maastricht*, «Affari sociali internazionali», vol. 2, 2003, pp. 61-73.

15 U. Beck, *Che cos'è la globalizzazione?*, Roma, Carocci, 1999, p. 13.

16 U. Beck, *Libertà o capitalismo? Varcare la soglia della modernità*, Roma, Carocci, 2001 p.

In questo periodo, anche il fenomeno delle migrazioni internazionali è destinato ad espandersi e inizia a delinearsi un nuovo approccio al tema dell'immigrazione e della situazione dei paesi di esodo «che punta a finalizzare gli aiuti all'obiettivo dello sradicamento della povertà, intesa in un'accezione ampia ed inclusiva non solo degli aspetti strettamente economici ma anche di istruzione, diritti umani, ambiente, uso delle risorse e capacità degli individui di vivere una vita dignitosa». Contemporaneamente, «si avvia anche una riflessione sui rischi e le opportunità che la globalizzazione dell'economia, vale a dire la crescente interconnessione dei mercati, e l'emergere della società dell'informazione creano per i paesi più poveri»[17].

Preoccupata per la possibilità che si sarebbero potuti creare i presupposti per una eventuale «marginalizzazione» dei paesi più poveri, la comunità internazionale cercò di capire quali potessero essere gli interventi più adeguati per dare alla globalizzazione una fisionomia «inclusiva», volta a consentire a tali paesi «di parteciparvi attivamente e trarne i maggiori benefici». A questo proposito, all'interno delle Nazioni Unite «si avvia un nuovo dibattito sulle prospettive economiche e sociali del pianeta attraverso numerosi eventi internazionali, dalla Conferenza di Pechino sulle donne, a quella di Copenaghen sullo sviluppo sociale, svoltesi nel 1995, fino alla *Dichiarazione del Millennio* approvata dall'Assemblea generale delle Nazioni Unite nel 2000»[18].

Con la *Dichiarazione del Millennio* (Risoluzione n. 55/2) vengono accettati – e indicati come obiettivi primari della comunità internazionale – i risultati emersi nelle varie conferenze succedutesi nel corso degli anni Novanta e concernenti i temi della pace, della sicurezza e del disarmo, nonché quelli relativi a «lo sviluppo, la riduzione della povertà, la salvaguardia dell'ambiente, la promozione dei diritti umani e della democrazia in tutto il mondo»[19].

Indubbiamente, questo nuovo modo di approcciarsi alle questioni concernenti l'immigrazione e di voler conoscere e tener presente la situazione dei paesi di origine degli immigrati rappresentava un grande passo in avanti rispetto alle precedenti politiche migratorie – concentrate essenzialmente sulla difesa delle frontiere esterne e sul varo di misure di sicurezza e protezione dei confini –, volte principalmente a curare gli interessi dei paesi membri.

44. In merito al concetto di globalizzazione, si vedano anche Z. Bauman, *Dentro la globalizzazione. Le conseguenze sulle persone*, Roma-Bari, Laterza, 2001, p. 3; e A. Giddens, *Le conseguenze della modernità*, Bologna, il Mulino, 1994.

17 F. Bonaglia, V. de Luca, *La cooperazione internazionale allo sviluppo*, Bologna, il Mulino, 2006, pp. 76-77.

18 *Ibid.*, p. 77.

19 *Ibid.*, pp. 90-91.

Le indicazioni dell'Unione Europea in merito all'integrazione dei lavoratori immigrati e all'istruzione dei loro figli nelle scuole europee

Nel corso degli ultimi decenni, l'integrazione dei lavoratori provenienti da paesi terzi in situazione di soggiorno regolare e della scolarizzazione dei loro figli ha avuto un posto centrale nell'agenda politica europea, ma è rimasta una questione controversa a livello locale. In molti contesti nazionali, infatti, ancora oggi, la *vexata questio* verte più sulla domanda se sia il caso o meno di accettare gli immigrati sui propri territori, anziché sulle significative opportunità che può offrire la loro integrazione in termini di vantaggi economici, sociali e culturali.

Da parte di molti governi degli stati membri, infatti, non sembra ci sia una reale volontà di approfondire la questione e di adoperarsi concretamente per favorire il dialogo tra le diverse culture presenti nei propri territori. A conferma di ciò, basterebbe qui fare riferimento alle notevoli resistenze opposte dai vari paesi ad assumere nelle rispettive legislazioni nazionali diverse norme e disposizioni presenti nella legislazione europea in materia di accoglienza ed integrazione degli immigrati. Molti governi, ad esempio, hanno affrontato i problemi emersi nei loro paesi in seguito alla presenza di immigrati sulla base di soluzioni spesso scoordinate e contingenti perché volte a risolvere problemi specifici particolarmente urgenti nel momento stesso in cui questi si creano: «Spesso è mancata una strategia globale e di conseguenza la risposta da parte delle autorità pubbliche è stata spesso meno efficace di quanto avrebbe potuto essere, nonostante molti paesi si siano impegnati attivamente nel campo delle relazioni intercomunitarie»[20].

Alcuni paesi si sono dimostrati più disponibili di altri nei riguardi dell'eventualità di un'immigrazione a carattere permanente ed hanno cercato di affrontare la questione dell'integrazione degli immigrati adottando delle politiche sociali di riconoscimento e di sostegno alle persone di etnie diverse. In diversi altri paesi, viceversa, gli immigrati vivono ancora ai margini delle società e, talvolta, la situazione appare inasprita e altamente complicata, al punto che i problemi creatisi risultano essere difficilmente risolvibili a causa di due insiemi principali di fattori: «in primo luogo gli immigrati sono spesso privi di quegli strumenti che consentirebbero loro di svolgere un ruolo efficace nell'ambito della società: si possono citare, ad esempio, la padronanza della lingua, l'istruzione e la formazione professionale, la sicurezza della residenza, nonché la conoscenza adeguata dei codici e delle prassi che regolano la vita quotidiana. In secondo luogo la società e le sue istituzioni non sempre sono facilmente accessibili ai membri delle comunità di immigrati»[21].

[20] Al riguardo si veda: Consiglio d'Europa, *Relazioni intercomunitarie ed etniche in Europa. Rapporto finale del Progetto per le relazioni intercomunitarie del Consiglio d'Europa*, Strasburgo, 1996, pp. 12-13, in <http://www.coe.int/t/dg3/migration/archives/Documentation/Series_Community_Relations/MGCR> (ultimo accesso: 16.06.2020).

[21] *Ibid.*, pp. 10-11.

A questo riguardo, si comprende bene l'importanza dell'attività di monitoraggio svolta dal Consiglio di Europa, nonché la necessità di formulare programmi di azione e di promuovere politiche specifiche e attività di cooperazione coi suoi *partner* internazionali.

Su questo versante, vale la pena di ricordare l'elaborazione di due importanti documenti volti a definire le politiche educative dei governi nazionali: il *Commento sull'educazione ai sensi della Convenzione-quadro per la tutela delle minoranze linguistiche* del 2006[22], il quale sollecita gli Stati membri a promuovere politiche educative che non mirino solo alla «protezione delle culture e dei linguaggi delle minoranze», ma anche alla disseminazione e allo sviluppo «del dialogo interculturale e dello spirito della tolleranza»; e la *Dichiarazione finale della 22esima sessione della Conferenza permanente dei Ministri Europei dell'Educazione*, tenutasi ad Istanbul in Turchia nel 2007, nella quale «all'enfasi sulle pari opportunità di accesso, si associa anche l'attenzione verso l'obiettivo del successo formativo e verso la promozione dell'apprendimento interculturale e dell'educazione alla cittadinanza democratica in una prospettiva di *lifelong learning*».

In questa *Dichiarazione*, fra l'altro, i governi nazionali sono invitati a prestare particolare attenzione allo sviluppo delle «competenze chiave per la cultura democratica e la coesione sociale», tra le quali sono annoverate «la competenza interculturale e plurilinguistica, oltre allo sguardo multi-prospettivo e solidale», nonché la messa in campo di misure concrete atte a rendere possibile «un'educazione effettivamente inclusiva, in particolare per i soggetti socialmente e culturalmente esclusi»[23].

In questo senso, per quel che concerne più nello specifico la scuola, non si può non rilevare l'importanza di educare le nuove generazioni a considerare il nuovo contesto multietnico e multiculturale come un elemento positivo, volto ad arricchire – attraverso il contatto con altri punti di vista ed altre prospettive culturali – non soltanto gli immigrati, ma anche i loro compagni autoctoni.

Su tale versante, il primo criterio preso in considerazione da tutti gli stati, ai fini di una positiva integrazione, è quello della conoscenza della lingua del paese ospitante. Al riguardo, la maggior parte dei sistemi educativi, allo scopo di favorire tale apprendimento, ha ritenuto opportuno fornire dei sostegni specifici corrispondenti a due modelli principali: Il *modello integrato* e il *modello separato «transitorio»*. Per quel che concerne il primo modello, gli alunni immigrati sono inseriti nelle classi ordinarie corrispondenti e seguono le stesse lezioni e gli stessi contenuti curricolari dei loro compagni autoctoni, ma beneficiano dell'ausilio di misure di supporto «applicate su base individuale per

[22] Per un approfondimento in materia di tutela delle minoranze nazionali, cfr. <http://www.edi.admin.ch/frb/00497/00498/01456/index.html?lang=it> (ultimo accesso: 16.06.2020).

[23] R. Serpieri, E. Grimaldi, *Che razza di scuola. Praticare l'educazione interculturale*, Milano, FrancoAngeli, 2013, p. 26.

ogni alunno durante il normale orario scolastico»[24]. Rispetto a questo modello, peraltro, in alcuni casi è previsto anche un insegnamento extracurricolare svolto al di fuori del normale orario di lezioni, ma sempre all'interno delle strutture scolastiche. In generale, «gli alunni immigrati in questione, ricevono un'assistenza speciale per superare le difficoltà nell'apprendimento della lingua e, in misura minore, quelle più generali (lacune in altre aree del curriculum)»[25].

Per quanto riguarda il *modello separato «transitorio»*, questo può assumere due forme che consistono in «accordi transitori» o in «misure a lungo termine». Nel primo caso, per un periodo di tempo limitato, gli alunni immigrati sono tenuti separati dagli alunni autoctoni e ricevono un supporto particolare adattato ai loro bisogni. Questa forma prevede anche la presenza di questi bambini ad alcune lezioni della classe ordinaria insieme ai bambini autoctoni; nel caso delle «misure a lungo termine», invece, gli alunni immigrati (in genere, tale forma viene messa in atto soprattutto nei confronti di bambini appena arrivati nel paese ospitante), sono inseriti sulla base delle loro competenze linguistiche, per uno o più anni scolastici, in classi speciali costituite all'interno della struttura scolastica ospitante che prevedono insegnamenti di livello intermedio o avanzato.

Nello specifico, «Queste classi hanno lo scopo di offrire ai bambini in questione un'assistenza che è focalizzata sui loro bisogni speciali (e particolarmente sui loro bisogni linguistici) e di facilitare la loro graduale integrazione nel sistema scolastico ospitante»[26].

All'interno di questi due principali modelli di integrazione, troviamo una vasta gamma di misure di supporto[27], le quali possono essere ricondotte a tre categorie di sostegno riguardanti rispettivamente: le «misure di supporto tese a compensare le lacune linguistiche degli alunni immigrati la cui lingua materna non è la lingua di insegnamento». Sostanzialmente, «si tratta di un insegnamento basato sul metodo della "immersione linguistica" secondo il quale gli alunni sono esposti direttamente alla lingua del paese ospitante e ricevono un insegnamento intensivo durante il normale orario scolastico, individualmente o in piccoli gruppi (supporto linguistico speciale). È anche possibile un insegnamento "bilingue", che viene offerto in parte nella lingua di insegnamento e in parte nella lingua originaria degli alunni».

[24] Eurydice, *L'integrazione scolastica dei bambini immigrati in Europa*, 2004, p. 44, in <http://www.eurydice.org> (ultimo accesso: 22.06.2020).

[25] *Ibid.*, p. 45.

[26] *Ibid.*, pp. 45-46.

[27] Ovviamente, i vari paesi europei hanno adottato approcci diversi per l'offerta e l'organizzazione di queste misure. A questo proposito, cfr. W. Thomas, P. Collier, *A National Study of School Effectiveness for Language Minority Students' Long-Term Academic Achievement*, Center for Research on Education, Diversity & Excellence, Questo rapporto può essere consultato online all'indirizzo: <http://www.crede.ucsc.edu/research/llaa/1.1_final.html> (ultimo accesso: 22.06.2020); J. Cummins, *Language, Power, and Pedagogy. Bilingual children in the cross-fire*, London, Multilingual Matters, 2000.

La seconda categoria è incentrata su misure di sostegno volte a rispondere «alle necessità linguistiche degli alunni immigrati attraverso determinate aree del *curriculum* del livello di istruzione al quale sono iscritti. In questo quadro, è possibile che siano apportate delle modifiche al contenuto ed ai metodi didattici del *curriculum* ordinario; possono essere organizzati corsi di sostegno e, talvolta, è possibile che gli alunni immigrati non siano valutati nello stesso modo degli altri alunni».

Nella terza categoria di sostegno, infine, rientrano tutte quelle misure volte ad organizzare la classe in modo da facilitare l'apprendimento; in particolare, si tende a ridimensionare il numero dei bambini per classe così da consentire un «migliore rapporto alunno/insegnante»[28].

Per quel che riguarda l'educazione interculturale, vale la pena di rilevare che ormai quasi tutti i sistemi scolastici europei (paesi membri dell'Unione Europea, paesi candidati e paesi AELS/SEE) «tengono conto, nei programmi di insegnamento, dell'approccio interculturale, definito come 'l'insieme dei processi attraverso i quali sono stabilite le relazioni fra le diverse culture'»[29] A questo proposito, un'indagine condotta nel 2004 da Eurydice (rete di informazione sull'istruzione in Europa) sui programmi d'insegnamento e sulla normativa relativa all'istruzione nei paesi europei documenta che «gli obiettivi dell'approccio interculturale si riconducono a tre aspetti principali: 1) l'*aspetto dell'apprendimento della diversità culturale*, che dovrebbe aiutare gli alunni a sviluppare i valori di rispetto e di tolleranza (in alcuni paesi, la lotta contro il razzismo e alla xenofobia è parte integrante di questo aspetto); l'*aspetto della conoscenza del quadro internazionale*, il quale, attraverso lo studio delle problematiche economiche e sociali che sottostanno alle relazioni internazionali (in particolare nord/sud) e della storia del fenomeno della migrazione e delle sue cause, fornisce la comprensione della diversità culturale odierna nel suo contesto storico e sociale; infine, l'*aspetto relativo al sentimento di appartenenza europea*, incentrato sulla comprensione delle caratteristiche culturali dei popoli europei, sulla storia dell'integrazione europea e sul ruolo svolto in Europa dai singoli paesi membri, che permette agli alunni di sviluppare il «senso di identità europea»[30].

In generale, nella maggior parte degli stati europei, l'approccio interculturale è compreso negli obiettivi generali dei *curricula* nazionali e/o in altri documenti ufficiali relativi all'istruzione pubblica e ai sistemi scolastici. In alcuni paesi come l'Italia, il Lussemburgo e i Paesi Bassi, invece, tale approccio compare soltanto in altre fonti di varia natura, quali ad esempio, le circolari ministeriali

[28] Eurydice, *L'integrazione scolastica dei bambini immigrati in Europa*, cit., pp. 46-47.

[29] *Ibid*., p. 59; al riguardo si veda anche Consiglio d'Europa, *Facets of interculturality in education*, Strasbourg, 2004, p. 9.

[30] Eurydice, *L'integrazione scolastica dei bambini immigrati in Europa*, cit., p. 59.

in Italia, i manuali scolastici in Lussemburgo, i decreti concernenti gli obiettivi principali dell'istruzione nei Paesi Bassi.

A questo riguardo, dall'indagine effettuata da Eurydice nel 2004, risulta che «nei curricoli dei paesi europei e in altri documenti ufficiali sull'istruzione obbligatoria, l'approccio interculturale compare, in genere, sotto forma di competenze, di tematiche o di valori che dovrebbero essere sviluppati su basi trans-curricolari o, in altre parole, attraverso i differenti componenti del curriculum, se questo lo permette. Infatti, circa la metà dei paesi considerati, ha individuato determinate materie attraverso le quali l'approccio interculturale dovrebbe essere sviluppato»[31].

In tal senso, vale la pena di ricordare anche la *Raccomandazione sulle competenze fondamentali per l'istruzione e la formazione permanenti* del Parlamento Europeo e del Consiglio, approvata il 18 dicembre 2006, la quale illustra «le attitudini, le conoscenze e gli atteggiamenti di cui l'istruzione dovrebbe dotare gli individui per favorire la loro integrazione, la loro realizzazione e il loro sviluppo personale, la cittadinanza attiva, l'integrazione sociale e l'occupazione nell'Europa moderna».

Allo scopo di sottolineare l'importanza attribuita dal Consiglio a questi aspetti sociali, il documento continua affermando che il Consiglio Europeo attende con interesse «la proposta della Commissione relativa ad una Agenda sociale rinnovata che dovrebbe svolgere un ruolo capitale nel rafforzare la dimensione sociale della *Strategia di Lisbona* tenendo conto delle nuove realtà sociali e lavorative dell'Europa e contemplando inoltre i problemi relativi ai giovani, all'istruzione, ai flussi migratori e alla situazione demografica nonché il dialogo interculturale».

Il Consiglio Europeo esorta, inoltre, gli stati membri ad intraprendere azioni concrete al fine di: «migliorare i livelli di istruzione degli allievi appartenenti a famiglie migranti o a categorie svantaggiate; fare in modo che un maggior numero di adulti, in particolare i lavoratori poco qualificati e più anziani, partecipino ad attività di istruzione e formazione e facilitare ulteriormente la mobilità geografica e occupazionale; promuovere una maggiore partecipazione complessiva della forza lavoro e combattere la segmentazione per garantire l'inclusione sociale attiva; migliorare la coerenza e il coordinamento delle politiche economiche, sociali e occupazionali per rafforzare la coesione sociale»[32].

Tali principi sono ribaditi anche nel libro verde *Migrazione e mobilità: le sfide e le opportunità per i sistemi d'istruzione europe*i, pubblicato nel luglio del 2008. In tale testo i diversi paesi europei sono esortati a considerare la sfida

[31] *Ibid*., p. 61.

[32] Cfr. al riguardo, *Conclusioni della Presidenza del Consiglio dell'Unione Europea*, Bruxelles, 20 maggio 2008, 7652/1/08, Rev. 1, Concl. 1, nota di trasmissione della Presidenza alle Delegazioni, Oggetto: *Consiglio Europeo di Bruxelles del 13 e 14 marzo 2008*, pp. 13-15.

educativa nel contesto più ampio della coesione sociale. A questo proposito, si nota che il fallimento scolastico degli alunni immigrati può generare «il più ampio fallimento dell'integrazione sociale»; infatti, «Il basso livello di studi, il basso tasso di completamento del *cursus* scolastico e la frequenza degli abbandoni costituiscono per gli alunni migranti altrettanti ostacoli alla riuscita della loro integrazione, in una fase successiva, nel mercato del lavoro».

Il fallimento dell'integrazione nel sistema scolastico, a questo riguardo, può «ostacolare anche lo sviluppo di vincoli sociali positivi e di interazioni tra i vari gruppi, necessarie per la coesione sociale». Se i figli di migranti «lasciano la scuola e l'esperienza di scarsi risultati e di segregazione prosegue nella loro vita adulta, questo schema rischia di riprodursi nella generazione successiva».

Al contrario, se la scuola riesce a svolgere il suo ruolo, «gli alunni figli di migranti saranno pronti a percorrere con successo la via della piena integrazione nel mercato del lavoro e nella società. Una buona esperienza scolastica degli alunni migranti, a questo riguardo, persegue gli obiettivi di equità e di efficacia»[33].

Sulla base di tali convinzioni, nelle *Conclusioni del Consiglio del 12 maggio 2009 su un quadro strategico per la cooperazione europea nel settore dell'istruzione e della formazione* si affermava che l'obiettivo principale della cooperazione europea fino al 2020 doveva essere quello di «sostenere l'ulteriore sviluppo dei sistemi di istruzione e formazione degli Stati membri» e si raccomandava di assicurare a tutti i discenti, e in modo particolare agli alunni degli immigrati, il completamento del percorso di istruzione e la promozione delle competenze interculturali[34].

Nella *Relazione annuale sull'immigrazione e l'asilo* del 2010 la Commissione Europea prendeva tuttavia atto che, nonostante il notevole lavoro svolto nel corso degli anni per promuovere l'integrazione degli immigrati nei paesi di accoglienza, la popolazione europea era ancora incline ad assumere atteggiamenti volti ad alimentare discriminazione e razzismo, nonché ad ostacolare gli sforzi degli immigrati per integrarsi nella società.

Al riguardo, nella *Relazione annuale* si affermava che, per far fronte a questi problemi, la Commissione avrebbe provveduto non soltanto a varare «un progetto pilota volto ad individuare indicatori che consentano di monitorare i risultati delle politiche di integrazione», ma anche a delineare una serie di «moduli europei» atti a sostenere le politiche e le prassi nazionali e locali in

[33] Commissione delle Comunità Europee, *Migrazione e mobilità: le sfide e le opportunità per i sistemi d'istruzione europe*i, COM(2008) 423 definitivo, Bruxelles, 3/7/2008. Il testo si basa su un ampio lavoro di ricerca e di analisi documentaria, a cominciare dai lavori di Eurydice e dell'OCSE sull'istruzione degli alunni provenienti da un ambiente migratorio, nonché da un importante studio bibliografico realizzato dall'European Forum for Migration Studies dell'Università di Bamberg.

[34] Consiglio di Europa, *Conclusioni del Consiglio del 12 maggio 2009 su un quadro strategico per la cooperazione europea nel settore dell'istruzione e della formazione* ('ET 2020'), DOC. 9845/09.

materia di integrazione. Sempre a questo scopo, inoltre, il *Forum europeo sull'integrazione*, nel corso del 2010, organizzava due riunioni di confronto e attivava un sito web europeo sull'integrazione. In alcuni paesi, infine, erano introdotti «test volti a stabilire il grado di integrazione dei cittadini di paesi terzi»[35].

Anche negli anni successivi, l'integrazione dei lavoratori immigrati in situazione di soggiorno regolare e la scolarizzazione dei loro figli hanno avuto un posto centrale nell'agenda politica europea, ma tale processo ha continuato a rimanere una questione controversa a livello locale. Sembra, dunque, di poter concordare pienamente con quanto affermato dalla Commissione Europea nella *Comunicazione sull'integrazione* del maggio 2011, nella quale veniva ribadito:

> Un'integrazione riuscita è essenziale per ragioni umane e culturali, ed è altresì necessaria per massimizzare i vantaggi economici e sociali dell'immigrazione, per i singoli individui così come per le società. Non vi è un solo modo per garantire il successo dell'integrazione, ma è chiaro che, per ottenere migliori risultati, è necessario un maggiore impegno sia a livello dell'UE che a livello nazionale e locale. Ogni migrante deve sentirsi a casa in Europa, rispettandone le leggi e i valori, e deve poter contribuire al futuro dell'Europa. L'integrazione richiede l'impegno sia del migrante che della società che lo accoglie. Il migrante deve avere la possibilità di partecipare alla vita della sua nuova comunità, di imparare la lingua del paese di accoglienza, di avere accesso al lavoro, all'istruzione e al sistema sanitario, e gli deve essere data la possibilità socioeconomica di autosostentarsi[36].

Per quel che concerne la scuola, non si può non rilevare l'importanza di educare le nuove generazioni a considerare il nuovo contesto multietnico e multiculturale come un elemento positivo, volto ad arricchire – attraverso il costante confronto con altri punti di vista ed altre prospettive culturali – non soltanto gli immigrati, ma anche gli autoctoni. Su questo versante, il contributo della pedagogia interculturale si rivela fondamentale, poiché tale disciplina offre agli insegnanti gli strumenti necessari per mettere in atto delle valide strategie educative volte a favorire le competenze interculturali e la capacità di dialogare, nonché a sviluppare le attitudini al rispetto per l'altro, al confronto con la diversità e al riconoscimento che nessuna cultura è superiore alle altre.

Sul versante scolastico, il processo di evoluzione della pedagogia interculturale ha dato vita ad un ripensamento delle metodologie didattiche e delle strategie educative secondo un modello formativo di matrice interculturale volto a considerare l'educazione come un «movimento di reciprocità» che induce le diverse culture e gli stessi individui che ne fanno parte ad accettare le

[35] Commissione Europea, *Comunicazione della Commissione al Parlamento Europeo e al Consiglio. Relazione annuale sull'immigrazione e l'asilo (2010)*, COM (2011) 291 definitivo, Bruxelles, 24.5.2011.

[36] Commissione Europea, *Comunicazione della Commissione al Parlamento Europeo al Consiglio, al Comitato Economico e Sociale Europeo e al Comitato delle Regioni. Comunicazione sulla migrazione,* COM(2011) 248 definitivo, Bruxelles, 4/5/2011, in <http://ec.europa.eu/home-affairs/news/intro/docs/1_IT_ACT_part1_v3.pdf> (ultimo accesso: 15.06.2020).

differenze e ad imparare a conoscere meglio se stessi e i propri limiti in modo da «correggere il 'senso' che le stesse condizioni esistenziali differenziate hanno per ciascuno di loro» e «rivedere e riadattare il proprio sapere e di conseguenza i propri comportamenti»[37].

[37] P. Bertolini, *L'educazione interculturale: riflessioni pedagogiche*, «Scuola Viva», vol. 4, 1991, p. 28.

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La letteratura italiana per l'infanzia in Polonia (1945-1989): traduzioni di classici e nuovi successi

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Italian children's literature in Poland (1945-1989): translations of classics and new hits

ABSTRACT: This article attempts to present a systematic account of issues around Polish translations of Italian literature for children and young adults between 1945 and 1989. Based on detailed bibliographic research, it shows which Italian works have been published by Polish publishers, both private and state-owned ones (until 1949) for the Polish bookstore shelves in this time-frame. Our findings indicate, in fact focused on the texts with which the Polish reading public had been familiar before World War Two. In the following decades, the publishing policies for a young readership were immensely affected by political, economic, cultural and, primarily, demographic factors. The publishing repertoire of Italian literature for young readers in Poland was first limited to the classics of Italian literature (Carlo Collodi and Edmondo De Amicis), but it started to expand in the course of time. Initially, the politically correct authors, such as Gianni Rodari and Marcello Argilli, were published; subsequently, new publications which were appreciated by Italian readers, critics and juries also started to appear in Poland. Our examination of the total publishing output in the years 1945-1989 implies that the repertoire was enriched through two channels: as a result of non-literary circumstances and due to the translation movement, which involved importing, on the one hand, new titles and, on the other, older books well-known to the older generations and enjoying the status of valuable readings.

EET/TEE KEYWORDS: History of Children's Literature; Translation Studies; Publishing Policy; Poland; Italy; XXth Century.

Introduzione

Dopo la Seconda guerra mondiale si registrò una fase piuttosto complicata nella storia delle relazioni fra l'Italia e la Polonia. Per le autorità polacche il ricordo delle alleanze strette dall'Italia durante la guerra appena conclusa era ancora fresco. Il giorno 5 luglio del 1945 il governo italiano riconobbe il Governo Transitorio di Unità Nazionale (*Tymczasowy Rząd Jedności Narodowej*) a Varsavia e decise di rilanciare i rapporti economici e culturali con la Polonia, anche se la politica di quel periodo influì in modo sostanziale sulle relazioni tra i due Stati. Nel dicembre del 1945 ripresero a Cracovia le attività dell'Istituto Italiano di Cultura e dell'Associazione Dante Alighieri, finalizzate alla diffusione della lingua e della cultura italiana in Polonia. I contatti culturali tra i due Stati sono stati poi rilanciati nel 1946 dalla donazione da parte dell'Accademia del Lincei alla città di Varsavia della collezione delle proprie pubblicazioni dal 1873 in poi. In seguito ai provvedimenti intrapresi dalle nuove autorità polacche e all'intervento dell'ambasciatore polacco a Roma, Stanisław Kot (1885-1975), la nuova Accademia Polacca delle Scienze, fondata nel 1952[1], avviò i contatti con il Centro Nazionale delle Ricerche, l'Accademia Nazionale dei Lincei e con università italiane e istituti scientifici.

Dobbiamo sottolineare che le autorità comuniste polacche tenevano i propri contatti esclusivamente con i comunisti italiani, denunciando il cinismo e l'ottusità del capitalismo della Penisola. La stampa polacca scriveva continuamente della crisi della lettura e della cultura, del «degrado economico e politico in Italia, cui si accompagnava quello culturale»[2], attribuendone la causa alla dittatura fascista, all'occupazione hitleriana e anglo-americana, al piano Marshall e al potere dell'"oscurantismo clericale". Si parlava degli otto milioni di analfabeti censiti, della debole ricezione sociale del libro (in particolare da parte delle donne italiane), degli alti costi del mercato editoriale, della popolarità dei romanzi gialli, di Shakespeare e dei classici russi (sic!), nonché dei romanzi americani. Si sottolineava quindi che la rinascita della cultura italiana sarebbe potuta avvenire solo con la trasformazione della società e la vittoria della classe operaia. Si diffuse allora un'esaltazione incondizionata degli scrittori legati alla sinistra, mentre il vero e proprio riconoscimento venne attribuito solo alle opere di Alberto Moravia[3].

[1] P. Hübner, *Siła przeciwko rozumowi…Losy Polskiej Akademii Umiejętności w latach 1939-1989*, Kraków, Wydawnictwo Secesja, 1994; B. Biliński, *Rzymska stacja naukowa PAN i polskie tradycje naukowe w Rzymie*, «Nauka Polska», n. 1, 1963, pp. 91-112.

[2] A. Nowicki, *Marshalizacja czytelnictwa we Włoszech*, «Kuźnica», n. 24, 1949, p. 7.

[3] M. Brandys, *O powojennej literaturze włoskiej*, «Odrodzenie» vol. 6, n. 24, 1949, p. 7.

1. *La ripresa modesta degli anni del dopoguerra (1945-1949)*

Nei primi anni dopo la Seconda guerra mondiale le case editrici polacche che avevano nel frattempo ripreso la loro attività, in particolare quelle private (tra le quali Michał Arct, Gebethner e Wolff, Jakub Mortkowicz, "Trzaska, Evert i Michalski"), non disponendo di mezzi finanziari adeguati, riutilizzarono spesso le traduzioni della letteratura per l'infanzia realizzate prima del conflitto. Tuttavia al loro sviluppo furono presto posti limiti per mezzo di decisioni amministrative (divieto di pubblicazione di molte opere della letteratura polacca, ritenute classiche; pignoramento dei beni personali; razionamento della carta). Naturalmente nelle biblioteche pubbliche e private sopravvissute alla guerra si conservavano ancora opere già precedentemente note e che, nella realtà postbellica, continuavano a essere lette.

Il 5 luglio 1946 fu emanato il decreto del Consiglio Nazionale di Stato (*Krajowa Rada Narodowa*) e del Consiglio dei Ministri *(Rada Ministrów*) che dispose la creazione di un Ufficio centrale di Controllo della stampa, delle pubblicazioni e degli spettacoli [*Główny Urząd Kontroli Prasy, Publikacji i Widowisk*]. Con questa decisione iniziò ufficialmente l'attività e il sistematico controllo di censura della stampa[4]. Il regime aumentò il suo controllo anche con l'esercizio di pressioni sulle case editrici private.

La considerazione della letteratura per l'infanzia da parte delle autorità era particolare[5], anch'essa legata alla situazione politica e ciò è vero soprattutto per le traduzioni dalla letteratura occidentale, soggetta dal 1949 a uno speciale veto.

Negli anni 1945-1949, solo grazie all'iniziativa di alcuni editori privati, furono pubblicate alcune opere italiane note già prima della Seconda guerra mondiale, tra cui sei edizioni di *Cuore* di De Amicis: quattro dalla casa editrice di Gebethner e Wolff, nella traduzione di Maria Konopnicka, una dalla casa editrice Przełom di Cracovia, in una traduzione di Leon Sternklar precedente la guerra, un'altra ancora dalla casa editrice L. Anczyc, in una nuova versione di Witold Zechenter. L'editore Wiedza pubblicò due edizioni dell'opera *Le avventure di Pinocchio. Storia di un burattino* nella traduzione di prima della guerra di Józef Wittlin, con le illustrazioni dell'artista polacco Ignacy Witz. La critica accolse favorevolmente l'opera di Collodi, sottolineandone il senso dell'umorismo, la fantasia allegra e grottesca[6], l'utilità pedagogica, nonché la cura della veste editoriale[7].

[4] S.A. Kondek, *Władza i wydawcy. Polityczne uwarunkowania produkcji książek w Polsce w latach 1944-1949*, Warszawa, Biblioteka Narodowa, 1993.

[5] M. Rogoż, *Polska literatura dla dzieci i młodzieży w okowach cenzury. Oceny wydawnicze książek z lat 1948-1956*, «Roczniki Biblioteczne», vol. 56, 2012, pp. 55-81.

[6] W. Grodzieńska, *Trzy przekłady książek dal dzieci*, «Kuźnica», n. 50, 1947, p. 10.

[7] Koź. [K. Koźniewski], «Przekrój», n. 91, 1947, p. 16.

Nel corso del Congresso sulla letteratura per ragazzi tenutosi a Varsavia dal 1° al 4 giugno del 1947, la scrittrice e traduttrice della lingua italiana, Helena Grotowska, presentò un rapporto sullo stato della letteratura per l'infanzia in Italia. L'analisi di questa autrice si basava sui circa duecento libri raccolti dagli organizzatori del congresso, forniti, come precisato da lei stessa, dagli editori italiani in maniera assai casuale e pubblicati in Italia per lo più dopo il 1945[8]. Questa ricognizione rimase per molti anni la prima e unica di questo tipo. La scrittrice sottolineò con entusiasmo l'accurata veste editoriale di quei libri («quasi tutti […] sono stampati su carta di buona qualità, con illustrazioni molto belle, in alcuni casi davvero magnifiche»)[9]. Nel presentare le serie editoriali più importanti, l'autrice notava nei libri rivolti ai giovani lettori (in quelli di allora, ma anche del periodo precedente) l'assenza di ideologia e la frequente presenza, semmai, di motivi religiosi, di motivi derivati dalla letteratura e dall'arte italiana, romana e antica o europea. Tra i testi presi in considerazione ci furono anche gli autori e i libri "di mare", alcuni dei quali sconosciuti in Polonia, come quelli di Giovanni Descalzo ed Eugenio Camillo Branchi (il cui *Mare* era ritenuto la continuazione di *Cuore*). Grotowska rimase colpita dalla mancanza di libri "eroici", ovvero bellici, e dal cospicuo numero di pubblicazioni di divulgazione scientifica che, in maniera accattivante e con abbondanza di illustrazioni, riuscivano a offrire una descrizione dei diversi fenomeni naturali; rimase inoltre incantata dai libri-giocattolo. Quanto ai "romanzi puri, privi di intenzioni didattiche", rivolse la propria attenzione alle pubblicazioni per ragazzi contenenti testi, secondo l'autrice, interessanti e di ottima qualità di stampa. Citò quindi le trame a suo parere più interessanti dei libri di questo gruppo, tra cui *Tompusse e i maestri* di Mario Buzzichini, *Il giorno dei piccoli* di Arpalice Cuman Pertile, *Un raggio di sole* di Giuseppe Fanciulli[10], *…E il monte si coprì di neve* di Laura Anzilotti, *Fiammiferino* di Luigi Barzini[11], *Vita di Pierre* di Paolo Reinaudo. La Grotowska riferiva con distacco delle imitazioni e continuazioni dell'opera di De Amicis (come ad esempio *Affetto: un anno di collegio*[12] di Ferdinando Augusto De Benedetti

[8] H. Grotowska, *Literatura dla dzieci i młodzieży we Włoszech w latach ostatnich*, «Ruch Pedagogiczny», vol. 31, n. 1, 1947-1948, pp. 31-43.

[9] *Ibid*., p. 32.

[10] In polacco è stato tradotto un altro romanzo di questo autore: *Fiore* (trad. polacca: *Jaśminek*, 1929). Cfr. M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, Toruń, Wydawnictwo Adam Marszałek, 2014, pp. 184-185.

[11] Il titolo esatto è *Le avventure di Fiammiferino*, romanzo che in polacco fu tradotto da Z. Krzyżanowska è pubblicato dalla Casa Editrice Czarnecki nel 1921.

[12] Il protagonista di questo romanzo, secondo Grotowska, fonda all'interno della scuola un'associazione segreta per la liberazione della Polonia e l'autore fa un breve cenno alla storia nazionale polacca (Grotowska, *Literatura dla dzieci i młodzieży we Włoszech w latach ostatnich*, cit., p. 40). Il romanzo è stato tradotto in polacco da Natalia Nagórna col titolo *Uczucie (rok w konwikcie): książka dla młodzieży*, e pubblicato nel 1913 a Varsavia.

o *Francolino* di Onorata Fava), dei libri per le ragazze (ad esempio *Ombre che passano…* di Rina Maria Pierazzi) e dei libri umoristici (come quelli di Antonio Rubino). Elencò le numerose edizioni di favole e fiabe adattate da altre letterature e alcune interessanti iniziative nazionali, come le *Novelline divertenti per bambini intelligenti* di Alfredo Panzini o *Il libro delle cento favole* di Teodosia Capalozza. Invece, per quello che riguardava la letteratura religiosa, le sembrarono interessanti le raccolte delle leggende connesse alla vita di Gesù Cristo o dei Santi e alle tradizioni cristiane popolari, come le *Trenta leggende d'oro* di Angela Colomba o la trilogia per i giovani lettori realizzata da Piero Bargellini e Giuseppe De Luca, che raccoglieva, in forma letteraria, il Vecchio e il Nuovo Testamento, brevi dissertazioni etiche, poesie e prose di carattere religioso, testi dei fondatori del cristianesimo, storie legate agli apostoli e alla Chiesa degli inizi. Molti di questi libri non sono mai stati pubblicati in Polonia.

Al Congresso erano state inviate anche alcune traduzioni italiane di opere polacche: gli italiani potevano vantarsi di possedere la traduzione del romanzo di Kazimierz Andrzej Czyżowski *Maciek, il re dell'aria*[13] o del libro di Wacław Sieroszewski *I doni del vento di mezzanotte*[14] (nella traduzione e con l'introduzione di Cristina Agosti-Garosci), pubblicato, in formato grande, in una raffinata edizione arricchita con disegni decorativi del folclore polacco.

In realtà, alla fine del 1949 solo due opere italiane sono state riproposte ai ragazzi polacchi. Il sentimentale *Cuore* e il "sicuro" *Pinocchio*, una soluzione logica della politica editoriale polacca del tempo.

2. *La censura del regime (1950-1956)*

Nel dopoguerra la maggioranza delle opere straniere per l'infanzia e l'adolescenza, pubblicate in Polonia nel periodo fra le due guerre, non aveva nessuna chance di essere riproposta ai lettori. Nel 1951 in Polonia il Ministero della Cultura e dell'Arte emanò la lista dei libri per l'infanzia proibiti dal regime comunista. I libri dovevano essere immediatamente eliminati dalle biblioteche pubbliche; alcuni furono sottoposti a distruzione, altri raccolti in sezioni speciali non aperte al pubblico, con il divieto di ristampa[15]. Tra i 562 titoli proibiti c'erano anche alcune opere italiane tra cui le opere di Giulio Erpianis, Cesarina

[13] L'edizione polacca è del 1925. Grotowska indica l'errato titolo *Maciuś król powietrza*. In Italia il libro è stato pubblicato nel 1928 nella traduzione di Irena Boni a Bologna-Rocca S.Casciano presso la casa editrice L. Cappelli.

[14] W. Sieroszewski, *I doni del vento di mezzanotte*, trad. Cristina Agosti Garosci, Roma, Società Apostolato Stampa, 1946.

[15] Z. Żmigrodzki, *Cenzura PRL. Wykaz książek podlegających niezwłocznemu wycofaniu 1.X.1951 r*, Wrocław, Nortom, 2002.

Lorenzoni, Maria B. (Benvegnù) Pasini e Olga Visentini[16]. Le opere eliminate non erano compatibili con lo spirito del regime, spesso erano pubblicate dalle case editrici con sede a Leopoli (la città che dopo la Seconda guerra mondiale non apparteneva più alla Polonia) o in contraddizione con la politica del governo polacco di quel momento.

La nuova produzione letteraria passava al vaglio della censura preventiva: ogni opera polacca o straniera che fosse, veniva sottoposta all'operazione di censura dell'Ufficio centrale di Controllo della stampa, delle pubblicazioni e degli spettacoli. I funzionari civili decidevano del rifiuto o del permesso di pubblicazione. Solo i testi ligi agli ordinamenti politici e sociali dello Stato polacco venivano accettati per la pubblicazione.

Nel periodo che intercorre dal 1951 al 1956 i lettori polacchi continuavano a leggere De Amicis e Collodi, in numero pari di edizioni. Al pubblico giovanile polacco non potevano mancare ovviamente le opere dei due maestri italiani politicamente consoni al clima culturale comunista, che introducevano nuovi valori nella letteratura per l'infanzia fra i quali figuravano la lotta di classe, la solidarietà e l'esaltazione del lavoro operaio e manuale: Gianni Rodari e Marcello Argilli.

Le prime filastrocche di Rodari, firmate con lo pseudonimo di Lino Picco, vengono stampate in Italia nel periodico «Domenica dei piccoli», nel marzo 1949:

> Erano giorni e mesi di stupenda, irripetibile tensione ideale, morale, intellettuale, di grandi speranze, di grandi illusioni. Il salone della cronaca, con le pareti e il soffitto ancora segnati dagli spezzoni e dalle schegge dei bombardamenti a tappeto, fu come un laboratorio umano di tutte le esperienze professionali e culturali, presenti e future, possibili e impossibili. Fra quel clan di ventenni entusiasti, inquieti, irrequieti, nacquero le prime filastrocche, per tutte le età della vita, di Gianni Rodari, il meno giovane di tutti: dette a braccio e poi raccolte con pazienza, oppure scritte sui muri, sulle porte, sui tavoli, sui vetri, sui grezzi fogli di carta che si usavano allora, gli scarti delle bobine per la rotativa[17].

Le "rime" fortemente innovative, nelle quali Rodari scoprì «un'Italia del lavoro che fino ad allora aveva avuto ben poca voce e distorta, nella poesia infantile»[18] corrispondevano all'ideologia politica polacca di allora. Nella produzione letteraria degli anni Cinquanta Rodari aveva introdotto i temi riguardanti «le differenze sociali, lo sfruttamento nel lavoro, l'antimilitarismo, la solidarietà tra oppressi»[19]. La notorietà di Rodari in Italia all'inizio degli

[16] L'elenco delle opere si trova in: K. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, Warszawa, Wydawnictwo Naukowe i Edukacyjne Stowarzyszenia Bibliotekarzy Polskich, 2018, p. 55.

[17] Citato da M. Rossitto, *Non solo filastrocche. Rodari e la letteratura del Novecento*, Roma, Bulzoni Editore, 2011, p. 23.

[18] M. Argilli, *Gianni Rodari. Una biografia*, Torino, Einaudi, 1990, p. 62.

[19] Citato da P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2009, p. 257.

anni Cinquanta era un effetto di rimbalzo dello straordinario successo riportato nell'URSS[20] dalle sue filastrocche tradotte dal grande poeta russo Samuil Marshak[21]. La fama dello scrittore italiano arrivò tramite l'URSS presto anche in Polonia, dove non poteva mancare il più celebre l'autore italiano per ragazzi amato dai russi, fondatore e direttore insieme a Dina Rinaldi de «Il Pioniere», un settimanale per ragazzi legato alla nascente Associazione dei Pionieri italiani.

In Polonia la fortuna di Rodari iniziò nel 1954, quando la casa editrice Nasza Księgarnia pubblicò il suo libro *Il romanzo di Cipollino*[22]. La traduzione del romanzo fu affidata a una giovane e ancora sconosciuta traduttrice di lingua italiana, Zofia Ernst[23]. Da quel momento la Ernst collaborò volentieri con la casa editrice, pubblicando le successive traduzioni delle opere di Rodari: nel 1955 uscì *Il viaggio della Freccia Azzurra*, nel 1957 furono pubblicati *Piccoli vagabondi*, e nel 1967 *Favole al telefono*.

L'impegno politico di Rodari emerge con particolare evidenza dalle *Filastrocche*[24], pubblicate in polacco nel 1956[25] e nelle introduzioni ai suoi libri. Uno di questi esempi è un breve brano di Rodari incluso nell'edizione polacca de *Il romanzo di Cipollino* intitolato *Buon viaggio Cipollino*, che è in pratica una lettera indirizzata ai lettori polacchi nella quale lo scrittore menziona per esempio la questione del lavoro minorile:

> Mi ricordo qualche ragazzino calabrese di dieci anni che lavorava, trasportando pietre, dalla mattina alla sera…. ragazzi siciliani, di otto – dieci anni che lavorano nelle miniere di zolfo e nelle cave di pietra, ragazzi pugliesi che vanno a raccogliere orzo…piccole ragazzine che raccolgono le olive… pastorelli dell'Abruzzo e della Sardegn[26].

Nella stessa lettera lo scrittore spiega dettagliatamente i motivi che giustificano, a suo parere, l'introduzione di alcuni avvenimenti o personaggi

[20] Marshak tradusse alcuni brani del *Il libro delle filastrocche*, pubblicati nella rivista Litieraturnaja Gazeta nel 1952. D. Caroli, *Samuil Maršak, poétique et pédagogie dans les albums illustrés pour les enfants des années 1920-1930*, in D. Caroli, A. Maître (edd.), *La littérature de jeunesse russe et soviétique: poétique, auteurs, genres et personnages (XIX^e^-XX^e^ siècles)*, Macerata, eum edizioni università di Macerata, 2018, pp. 149-185.

[21] S. Marszak, *Poczemu ja pieriewieł stichi di Gianni Rodari*, «Sobranie soczinienij», vol. 8, 1971, pp. 323-333; R. Cicala, *Tutte le lingue della fantasia. Rodari e le traduzioni nelle lettere alla Einaudi*, in P. Boero, L. Cerutti (edd.), *Rodari le storie tradotte*, Novara, Interlinea edizioni, 2002, p. 21.

[22] G. Rodari, *Opowieść o Cebulku* [Il romanzo di Cipollino], trad. Zofia Ernstowa, Warszawa, Nasza Księgarnia, 1954.

[23] K. Biernacka-Licznar, *Zofia Ernst (1918-1994): l'arte di vivere, l'arte di tradurre*, «Italica Wratislaviensia», vol. 8, n. 2, 2017, pp. 11-36.

[24] Come nota P. Boero «lo scrittore nell'edizione einaudiana di *Filastrocche in cielo e in terra* (del 1960) elimina proprio i testi caratterizzati dall'impegno politico e da temi comuni a certa produzione emotiva». Cfr. Boero, De Luca, *La letteratura per l'infanzia*, cit., p. 257.

[25] G. Rodari, *Wiersze* [Il libro delle filastrocche], trad. Janusz Minkiewicz, Warszawa, Nasza Księgarnia, 1956.

[26] Rodari, *Opowieść o Cebulku*, cit., p. 3.

fantastici, come ad esempio gli animali parlanti, nel solco della tradizione favolistica, precisando che «la verità è sempre la verità, anche se viene emanata da una talpa»[27]. Le prime scene del romanzo, inquadrate in quel contesto storico, sono eloquenti. Scopriamo in esse che Cipollone, il padre di Cipollino (una creatura del mondo vegetale) è in galera perché, spinto dalla folla che acclamava il cattivo Principe Limone, è finito tra le gambe di quest'ultimo; Cipollone spiega a Cipollino che, in galera, non ci vanno i criminali, ma le persone più nobili, e che tutto sommato è un onore trovarsi lì, dato che:

> Le prigioni sono fatte per chi ruba e per chi ammazza, ma quando comanda il Principe Limone chi ruba e ammazza sta alla sua corte e in prigione ci vanno i buoni cittadini[28].

Gli episodi che descrivono le avventure dei personaggi-verdura sono molto divertenti. Inoltre, nel tempo, l'autore migliorò la versione definitiva del romanzo, eliminando le digressioni ideologiche[29].

Nel 1955 la casa editrice Nasza Księgarnia pubblicò *Il viaggio della Freccia Azzurra*, un racconto che parla di giocattoli animati che finiscono nelle mani dei bambini poveri. Il racconto, benché fortemente ideologizzato, presenta una trama dinamica e interessante. La liberazione fantastica dei giocattoli dal negozio, la loro animazione e personificazione (il cagnolino Spicciola), le avventure che vivono coi bambini hanno un carattere universale e sempre attuale, come pure la morale sussurrata da Francesco all'orecchio di Spicciola nell'ultima pagina del libro: «Tutti i giocattoli del mondo non valgono un amico»[30].

Nella Polonia degli anni Cinquanta furono accolte anche le opere di Marcello Argilli, il vicedirettore del settimanale il *Pioniere*, che si impegnò all'Associazione Pionieri d'Italia (assieme a Gianni Rodari). Dopo la grande alluvione del Delta padano del 1951, Argilli si recò sul posto per un'inchiesta e raccolse le memorie di quel fatto drammatico nel romanzo "pionieristico" intitolato *I Pionieri di Vallescura*[31] (*Drużyna z Vallescura*), scritto fra il 1952 e il 1953 e uscito in Italia solo nel 1977, mentre nei paesi dell'Est europeo era già stato pubblicato nei primi anni Cinquanta (in Polonia nel 1956)[32]. Nel romanzo Argilli descrive la storia di un gruppo dei ragazzi pionieri che vivono in un villaggio Vallescura e si associano per poter partecipare alle lotte per la redenzione del Delta. I pionieri svolgono nel romanzo un chiaro l'esempio come un gruppo collettivo può risolvere i problemi sociali. La pubblicazione di

[27] *Ibid*., p. 8. Traduzione di K. Biernacka-Licznar [KB-L].

[28] G. Rodari, *Il romanzo di Cipollino*, Roma, Edizioni di Cultura Sociale, 1951, p. 9.

[29] La nuova edizione polacca del romanzo è stata annunciata nel 2012 dalla casa editrice Bona di Cracovia, ma purtroppo non è finora stata pubblicata.

[30] G. Rodari, *Viaggio della Freccia Azzurra*, Firenze, Edizioni C.D.S, 1954, p. 219.

[31] M. Argilli, *I Pionieri di Vallescura*, Milano, Edizioni scolastiche Bruno Mondadori, 1977; M. Argilli, *Drużyna z Vallescura*, trad. Barbara Sieroszewska, Warszawa, Nasza Księgarnia, 1956.

[32] Si veda la tesi di laurea di S. Borsato, *Uno scrittore per ragazzi Marcello Argilli. Analisi letterario-pedagogica della sua opera*, Università degli Studi di Padova, aa. 1984/1985, p. 13.

quell'opera in Polonia (ma anche in Cecoslovacchia, Unione Sovietica) poteva essere un valido e vero l'esempio per i simili gruppi dei pionieri nell'Europa dell'Est.

Dalla collaborazione di Argilli con Gabriella Parca nasce un romanzo per i ragazzi: *Le avventure di Chiodino*, la cui prima puntata appare nel settimanale «Pioniere» nel dicembre del 1952 (l'edizione polacca è del 1954)[33]. Chiodino è «un'invenzione dell'amor paterno», come recita il titolo del primo capitolo, ovvero dell'amore del professor Pilucca. L'origine del personaggio fa pensare subito al burattino Pinocchio. Il bambino meccanico, fatto di lamiera e qualche pezzo di acciaio, infatti, nasce dalla solitudine e dalla nostalgia di un costruttore che desidera ardentemente avere un figlio. Chiodino, nelle intenzioni del suo costruttore, dovrà essere autonomo, mostrandosi sempre gentile e ubbidiente, «come molto di rado sono invece i bambini in carne e ossa»[34]. Il ragazzo, tuttavia, risulterà testardo, mentre la sua struttura e la sua continua sete d'olio causeranno non pochi guai e disavventure a lui e al suo tutore: il padre verrà arrestato per debiti; Chiodino riuscirà a farlo evadere; poi si procurerà dei soldi per curarlo, quando sarà malato, ma i soldi gli verranno sottratti; catturato da altri personaggi che lo vogliono sfruttare per guadagnare denaro, lui stesso verrà processato e, infine, ricompensato dal destino per le buone azioni compiute, verrà liberato. La storia, se letta nella sua profondità metaforica, non è così leggera e divertente come quella di *Pinocchio*. Termina addirittura coi nemici di Chiodino fulminati da una scossa elettrica, col professore che si strappa due denti davanti all'addetto del monte dei pegni e con la sostituzione del cuore del ragazzino, costituito prima da un tegamino, poi da un orologio d'oro recuperato allo stesso monte dei pegni, grazie al quale egli comincia a provare sentimenti umani e riesce a non perdere la simpatia della sua piccola amica, Perlina.

Col passar del tempo la produzione di Argilli comincia a dividersi in tre grandi filoni: il primo legato alla fiaba moderna, il secondo legato all'attenzione verso il mondo degli adolescenti e il terzo concentrato verso i media. Il frutto di queste esperienze sono *Le dieci città*, pubblicate in polacco solo nel 1974, e *Storie di Fantasiopoli dolcissima metropoli* e *I viaggi di Osvaldo Fantageografia*, mai uscite in lingua polacca.

Negli anni Cinquanta i testi di Rodari e di Argilli (soprattutto i frammenti delle loro opere di Rodari, *Gelsomino nel paese dei bugiardi*, *Gip nel televisore*

[33] M. Argilli, G. Parca, *Przygody Gwoździka*, trad. Marcin Czerwiński, Warszawa, Nasza Księgarnia, 1955.

[34] M. Argilli, *Le avventure di Chiodino*, Milano, Arnoldo Mondadori, 1975, p. 9.

e di Argilli *Le avventure di Chiodino, Il mistero del gatto arancione*)[35] vennero pubblicati con successo anche su riviste polacche per la gioventù[36].

In questo clima di censura e di propaganda, i giovani lettori polacchi potevano continuare a leggere solo gli autori italiani "politicamente corretti": Argilli, Collodi, De Amicis e Rodari. Invece l'attenzione dei critici polacchi si polarizzò soprattutto su due opere principali: il racconto *Le avventure di Pinocchio. Storia di un burattino* e su *Cuore. Libro per ragazzi*. Non sempre le più conosciute opere degli autori italiani suscitavano opinioni positive. Nel 1955, uno dei maggiori scrittori polacchi del ventesimo secolo, Jarosław Iwaszkiewicz, affascinato dall'Italia e dalla sua cultura, sulle pagine della rivista "Dziennik Polski" espresse un'opinione assai critica verso il libro di De Amicis. Lo scrittore polacco ricordava che il romanzo, quando era stato bambino, lo aveva infastidito e annoiato, e sosteneva che doveva essere trattato come un «tipico esempio di libro per ragazzi molto amato dagli adulti»[37]; si trattava per lui di un romanzo artificiale, pieno di concetti democratici e slogan patriottici, dal tono sentimentale e filantropico. L'opinione di Iwaszkiewicz non ebbe però un effetto deterrente sulla pubblicazione del testo deamicisiano. Invece un altro scrittore polacco, Marian Brandys, scrisse di esserne stato molto affascinato e che, nonostante fosse un po' invecchiato, il testo non aveva perso di attualità dal punto di vista del messaggio sociale:

> Nell'Italia di oggi il povero carbonaio Betti non perdonerebbe più tanto facilmente il ricco Carlo Nobis. Molti degli insegnamenti morali contenuti in *Cuore* sono ormai invecchiati, appassiti, e risultano più utili ai lettori polacchi di oggi. Tuttavia le meravigliose scene legate alla scuola, descritte con vera maestria da De Amicis, hanno superato con la vittoria la prova del tempo e continuano ad incantare i giovani 'divoratori di libri'[38].

[35] Il romanzo *Il mistero del gatto arancione*, pubblicato a Praga, è stato scritto da dieci autori di dieci diverse nazioni. L'idea del romanzo era di Z.K. Slaby (cecoslovacco), che ha scritto il primo capitolo, che è stato poi passato, in tre diverse traduzioni (tedesco, francese, inglese) al secondo autore, che ha scritto il secondo capitolo e ha passato al terzo autore etc. Nel romanzo i capitoli sono opera di: Z.K. Slaby di Praga (Cecoslovachia); Joshitomo Imae di Tokio (Japan);. Pierre Gamarra di Parigi (Francia), Sergej Baruzdin di Mosca (USSR), Marcello Argilli di Roma (Italia), Jens Sigsgaard di Holte (Danimarca), Ahmet Hromdzic di Sarajevo (Jugoslavia), Friedrich Feld di Bexhill (Inghilterra), Otfried Preussler di Haidholzen (Germania) e Ludwik Jerzy Kern di Cracovia (Polonia).

[36] Si veda in merito per esempio: «Świat. Tygodnik Ilustrowany», «Nowa Kultura», «Płomyk», «Płomyczek», «Express Wieczorny», «Przekrój», «Sztandar Młodych», «Kultura i Życie», «Głos Szczeciński», «Świat Młodych». Si veda la voce bibliografica in J. Miszalska, M. Gurgul, M. Surma-Gawłowska, M. Woźniak, *Od Dantego do Fo. Włoska poezja i dramat w Polsce (od XVI do XX wieku)*, Kraków, Collegium Columbinum, 2007 ed anche J. Miszalska, M. Gurgul, M. Surma-Gawłowska, M. Woźniak, *Od Boccaccia do Eco. Włoska proza narracyjna w Polsce (od XVI do XXI wieku)*, Kraków, Collegium Columbinum, 2011.

[37] J. Iwaszkiewicz, *Niebezpieczeństwo Serca*, «Dziennik Polski» n. 164, 1955, p. 3.

[38] M. Brandys, *Do czytelników*, in E. De Amicis, *Serce*, Warszawa, Nasza Księgarnia, 1955, p. 6.

Dopo il 1956 le restrizioni verso la letteratura giovanile divennero relativamente meno rigide: continuò nel campo una netta preferenza per la letteratura russa e sovietica e per la letteratura degli altri paesi del blocco socialista[39], ma lo Stato lasciò alle case editrici e ai redattori una minima "libertà" e la scelta del repertorio editoriale per i ragazzi.

3. *Il periodo del "disgelo" e gli anni seguenti (1957-1970)*

Dalla svolta del 1956, caratterizzata da una relativa apertura alle traduzioni dalle letterature occidentali, fino al 1970, furono quasi ventinove i libri di autori italiani a disposizione dei giovani lettori polacchi. Vennero più volte ristampati *Cuore* e i racconti mensili: *Il piccolo scrivano fiorentino* e *Dagli Appennini alle Ande*, adottati come letture scolastiche (per un totale di otto diverse edizioni); a distanza di alcuni anni vennero ristampate anche nuove edizioni di *Le avventure di Pinocchio. Storia di un burattino* nella traduzione di Zofia Jachimecka.

Si continuarono a pubblicare i testi di Rodari, autore sempre più apprezzato e premiato a livello internazionale (nel 1970 con il più importante premio per la letteratura per l'infanzia, la Medaglia Hans Christian Andersen)[40]. Furono dunque pubblicate sette edizioni delle sue opere, tra cui, per la prima volta in Polonia, *Piccoli vagabondi* (1957)[41], due edizioni di *Il viaggio della Freccia Azzurra* (1957, 1961)[42], *Gelsomino nel paese dei bugiardi* (1962)[43], *La storia degli uomini* (1964, 1967)[44] e le *Favole al telefono* (1967)[45].

Soprattutto *Gelsomino nel paese dei bugiardi* è un racconto estremamente fantasioso che narra le avventure di un cantante dotato di una voce assai potente il quale vive in un paese dove tutto è e si chiama al rovescio. Una serie di incredibili eventi porta a una conclusione tanto seria quanto sorprendente, nella quale Rodari constata che è meglio organizzare delle buone partite che fare le guerre. Integra al racconto l'elenco delle canzoni del protagonista, poesie, come

[39] M. Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, in G. Gzella, J. Gzella (edd.), *„Nie należy dopuszczać do publikacji". Cenzura w PRL*, Toruń, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, 2013, pp. 99-122.

[40] P. Boero, *Una storia, tante storie*, Trieste, Einaudi Ragazzi, 2010.

[41] G. Rodari, *Mali włóczędzy* (*Picoli vagabondi*), trad. Z. Ernstowa, Warszawa, Nasza Księgarnia, 1957.

[42] Id., *Podróż Błękitnej Strzały* (*Il viaggio della Freccia Azzurra*), trad. Z.Ernstowa, Warszawa, Nasza Księgarnia, 1957.

[43] Id., *Gelsomino w kraju kłamczuchów* (*Gelsomino nel paese dei bugiardi*), trad. H. Ożogowska, Warszawa, Czytelnik, 1962.

[44] Id., *Najmniejsza historia ludzkości* (*La storia degli uomini*), trad. M. Rogoziński, Warszawa, Iskry 1964.

[45] Id., *Bajki przez telefon* (*Favole al telefono*), trad. Z. Ernstowa, Warszawa, Nasza Księgarnia, 1967.

scrive Rodari, dal tono molto diverso fra loro, alternando temi seri e impegnati, leggeri e faceti, che suscitano l'ilarità[46]. La traduttrice polacca dell'opera, Hanna Ożogowska – poetessa e scrittrice per l'infanzia – ha riprodotto lo stile divertente di Rodari per rendere il messaggio morale più facilmente efficace per la fantasia e la psicologia del bambino (come in *Le bugie*, *Quanti pesci ci sono nel mare? Giovannino Perdigiorno*).

L'impegno politico di Rodari è ben visibile anche in *Piccoli vagabondi*, romanzo ispirato a fatti veri (è lo stesso Rodari a dichiarare che «qui è tutto vero, dalla prima parola all'ultima» e le storie presentate narrano avvenimenti che l'autore ha conosciuto realmente)[47]. L'opera racconta la storia di ragazzi provenienti da povere famiglie dell'Italia meridionale per mostrare – conformemente alle convinzioni di Rodari – i vizi del regime precedente e le virtù del socialismo.

Un'espressione delle convinzioni politiche di Rodari è anche *La storia degli uomini*, una raccolta di leggende storiche, già pubblicate singolarmente sul settimanale comunista "Vie Nuove", che costituiscono un mini-manuale di storia universale, dai tempi antichi alla contemporaneità, composto di otto racconti, l'ultimo dei quali dall'altisonante titolo, *La liberazione dell'uomo*. Per l'edizione polacca si consultò addirittura uno storico ed essa fu integrata con informazioni relative alla storia dei popoli slavi e alla Polonia.

Dodici anni dopo la pubblicazione in Italia, nel 1968 uscirono, nella traduzione polacca di Jerzy Popiel, le *Fiabe italiane* di Italo Calvino[48]. In Polonia, soprattutto negli anni Sessanta, le opere di Calvino annoveravano molti ammiratori. Il grande scrittore non ha fatto solo il poderoso lavoro di ricerca, selezione e traduzione, ma «ha raccontato *ex novo* le storie più interessanti, animandole della sua grande arte letteraria. Così nacque uno dei rari "doni" che grande l'autore per adulti ha offerto ad un pubblico vasto (per i lettori grandi e piccoli)»[49]. L'edizione polacca conteneva una selezione di cinquanta delle duecento fiabe popolari italiane messe insieme dal noto scrittore a partire dalle raccolte pubblicate tra la fine del XIX e l'inizio del XX secolo da vari studiosi di folclore e da lui tradotte dai dialetti italiani in una lingua letteraria. Si trattava di fiabe molto diverse da quelle della tradizione polacca, e il loro fascino consisteva proprio nell'originalità e nella particolare nota esotica – per il lettore polacco – che le caratterizzava.

Negli anni Sessanta i ragazzi polacchi poterono leggere anche le novelle italiane contemporanee. Un altro esempio italiano della produzione letteraria degli scrittori adulti rivolta ai giovani è la raccolta intitolata in polacco, *Za*

[46] Id., *Gelsomino nel paese dei bugiardi*, Roma, Editori Riuniti, 1971, p. 127.

[47] Id., *Piccoli vagabondi*, Roma, Editori Riuniti, 1981, p. 55.

[48] I. Calvino, *Baśnie włoskie* (*Fiabe italiane*), trad. J. Popiel, Warszawa, Nasza Księgarnia, 1968.

[49] Citato da: M. Woźniak, K. Biernacka-Liczna *Serce Pinokia. Włoska literatura dziecięca w Polsce*, Kraków, Włoski Instytut Kultury w Krakowie, 2014, p. 14.

dwadzieścia lirów radości [*Venti lire di allegria*][50], pubblicata dalla casa editrice Nasza Księgarnia nel 1964, che conteneva tredici racconti[51] realistici di famosi autori italiani per adulti, incentrati in particolare su questioni sociali, quali la povertà, la mancanza di mezzi di sostentamento e l'educazione dei figli provenienti da famiglie antifasciste nell'Italia di prima della guerra. L'idea di una raccolta di racconti era di Dina Rinaldi, la direttrice del «Pioniere» e di Leone Sbrana, collaboratore in quel periodo del «Pioniere». La loro iniziativa della pubblicazione era apprezzata non solo dal partito comunista italiano, ma è stata conosciuta al di fuori dell'area italiana.

Con queste parole Rinaldi e Sbrana presentavano la raccolta ai ragazzi italiani:

> È vero, scrivere per i ragazzi è una cosa difficile e seria. Occorrono numerose e particolari doti: semplicità, fantasia, gusto e ricchezza di sentimenti, amore per l'uomo e la verità. Queste doti sono presenti nelle opere dei nostri migliori scrittori, ma purtroppo si trasmettono di rado nelle letture infantili, perché non è costume della nostra scuola e della nostra società aiutare i giovani a conoscere i narratori d'oggi, mentre voi, come altri, avete il diritto di conoscere ed apprezzare ciò che di meglio esprime la letteratura della società in cui vivete. Per questo ci siamo proposti di favorire un incontro vivo e reale fra i più giovani lettori e gli scrittori italiani […] il volume che vi presentiamo è nuovo, diverso da ogni altro, ricco di immagini e di suggestioni, anche perché gli scrittori che qui hanno scritto per voi, non hanno voluto considerarvi un pubblico al quale occorra insegnare piccole quanto inutili virtù, modesti sentimenti, l'ossequio ad antichi miti e a certe glorie passate. Essi hanno scritto questi racconti considerandovi dei giovani pronti alla vita, partecipi delle passioni del mondo moderno, protagonisti voi stessi dell'epoca in cui viviamo. Hanno voluto offrirvi, insomma, una sorta di cannocchiale attraverso il quale vi sia possibile cogliere immagini e colori che spesso, per tante ragioni di cui non avete colpa alcuna, ancora non potete vedere[52].

Nella versione polacca della raccolta non troviamo più la prefazione. La pubblicazione del libro in Polonia probabilmente è il risultato della partecipazione dei letterati polacchi al convegno sulla letteratura per l'infanzia

[50] La raccolta fu pubblicata in Italia sotto titolo *Racconti nuovi: gli scrittori italiani per i nuovi lettori: i ragazzi e i giovani d'oggi* a cura di Dina Rinaldi e Leone Sbrana da Editori Riuniti-Pioniere nel 1960.

[51] L'invito rivolto da Rinaldi a scrittori per adulti, appartenenti all'area della sinistra, aveva come lo scopo ottenere i racconti nei quali vengono descritte le proprie esperienze e i propri messaggi ideali degli autori stessi. La versione italiana dei racconti mensili contava 34 racconti, nella versione polacca abbiamo solo i 13 racconti, tra cui: La G. Arpino, *Il ragazzo che non voleva imparare*; R. Brignetti, *Venti lire di allegria*; I. Calvino, *Il reggimento smarrito*; Aldo De Jaco, *La paura*; G. Manzini, *Alfredino*; E. Morante, *Il mondo Marte è cascato*; I. Moretti, *L'orologio*; N. Palumbo, *La mia università*; P.P. Pasolini, *Biciclettone*; U. Pirro, *Diario di uno scolaro*; D. Rea, *Il ragazzo ritrovato*; M. Venturi, *Il balilla*; R. Viganò, *La bambola brutta*.

[52] Citato da: S. Franchini, *Diventare grandi con il Pioniere (1950-1962): politica, progetti di vita e identità di genere nella piccola posta di un giornalino di sinistra*, Firenze, Firenze University Press, 2006, p. 19.

tenutosi a Torino sotto gli auspici dell'Associazione Italia-URSS nel marzo del 1960.

Nel periodo che va dal 1957 al 1970 furono tradotte anche opere di scrittori sconosciuti fino ad allora in Polonia. Tra le novità di tale periodo si trovano anche molti romanzi, tra cui quello di Baccio Mario Bacci (*Il cielo di pietra*, 1959) sulla vita del famoso architetto, scultore e pittore italiano Filippo Brunelleschi e la Firenze dei suoi tempi. Ai lettori polacchi giunse una delle rare opere per bambini piccoli di Guglielmo Zucconi, sulle avventure equestri di *Scaramacai* (1965); venne inoltre pubblicato il romanzo d'avventura di Rossana Guarnieri *Un'avventura per l'estate* (1970), nella collana "Klub 7 Przygód" [Club di sette avventure].

La ricezione delle opere di autori italiani da parte della critica letteraria polacca fu entusiasmante. Basti vedere, per esempio, i positivi giudizi delle opere di Rodari sulla rivista di critica letteraria «Nowe Książki»[53], o la recensione di Hanna Burkowa, delle *Fiabe italiane* di Calvino. La critica letteraria notava, oltre ai tratti comuni con le fiabe di altre nazioni, la presenza di elementi molto originali nell'opera di Calvino:

> […] l'ammirazione per la bellezza dell'uomo, per la forma del suo corpo, per il fascino e la grazia della persona. Si nota […], l'amore per lo svago, i bei vestiti, il buon cibo, il lusso, le pietre preziose e l'oro. Tutto ciò si ritrova in tutti racconti, come se ognuno di essi fosse un'eco lontana dello stile di vita rinascimentale, trasportato, attraverso il tempo, da autori anonimi e infine dagli studiosi del folclore[54].

L'autrice della recensione si soffermava anche sul bell'aspetto formale dell'edizione, sulle magnifiche illustrazioni di Wiesław Majchrzak, simili a miniature pittoriche, con colori leggermente spenti e sfumati racchiusi in tonalità di rosso, verde e marrone dorato[55].

4. *L'ultima fase del socialismo in Polonia: (1971-1989)*

Il ventennio successivo, data la sempre più profonda crisi del mercato editoriale in Polonia, ma anche la maggiore libertà nella scelta di titoli della letteratura per l'infanzia da tradurre e pubblicare, si presenta per la storia dell'editoria polacca come un periodo caratterizzato da curiose discontinuità. Nella condizione di apparentemente libera concorrenza tra le poche (tutte

[53] Cfr. Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, cit., pp. 158-169.

[54] H. Burkowa, *Baśnie z kraju Romea i Julii*, «Nowe Książki» n. 7, 1969, pp. 483-484. Traduzione: KB-L.

[55] *Ibid*., p. 483.

statali) case editrici era in teoria possibile scegliere non solo fra i classici già noti, ma anche fra i nuovi titoli dalla letteratura mondiale. Purtroppo tale possibilità venne sfruttata solo di rado: le case editrici decisero di solito di orientarsi sulle nuove traduzioni di libri già precedentemente tradotti[56], imponendo le proprie scelte a traduttori noti con i quali collaboravano già da tempo; alle volte furono questi ultimi a proporre nuovi titoli, ma quasi mai ci si rivolse alla lista di bestseller o libri premiati. I lettori polacchi continuarono ad avere nuove edizioni di opere ormai ben note, spesso presenti nell'elenco delle letture scolastiche (*Cuore* di De Amicis, 10 edizioni, e *Pinocchio* di Collodi, 12 edizioni). Rodari apparve soltanto come autore del già precedentemente pubblicato *Gelsomino nel paese dei bugiardi* (1978, 1987). L'offerta editoriale proponeva non più di quattro titoli italiani all'anno, ma spesso veniva offerto solo un titolo. Uscirono romanzi come *Domani dopodomani* di Renée Reggiani (1974), *Le dieci città* di Marcello Argilli (1974), *Marco in Sicilia* di Luciana Martini (1976, 1980, 1985), *Qui detective R.3: Missione compiuta!* (1976) di Giuliano Amici, *Girotondo veneziano* di Ermanno Libenzi (1978), *La luna nelle baracche* (1979) e *El loco* (1983) di Alberto Manzi, *La paranza nera* di Paolo Giani (1980), Bianca Pitzorno apparve sul mercato polacco con la traduzione del suo romanzo fantascientifico *Clorofilla dal cielo blu*, pubblicato nel 1981 e infine *Ragazzo etrusco* di Teresa Buongiorno uscito in polacco nel 1988. Alla fine degli anni Ottanta si tornò a ristampare le opere di uno dei più famosi classici italiani della letteratura d'avventura: Emilio Salgari. Furono pubblicati in quel periodo *La montagna di luce* (1987, 1989), *Il re dell'aria* (1988) nelle traduzioni apparse negli anni Trenta del XX secolo[57]. È oggi difficile valutare come mai non furono commissionate nuove, moderne traduzioni dei suddetti romanzi. Ciò fu forse una conseguenza della crisi finanziaria delle case editrici in quel torno di tempo in Polonia.

Negli anni Ottanta si continua di proporre ai ragazzi polacchi le traduzioni delle opere di Luciana Martini, *Cara Assuntina* (1983) e *Il colore del vento* (1985). Nel 1987 vide la luce la traduzione dell'opera di Antonio Gramsci *L'albero del riccio* (1987). Furono tradotti anche alcuni libri di divulgazione scientifica rivolti ai giovani lettori. Sono edizioni che non hanno nulla a che vedere con quelle che in tale ambito vengono prodotte oggi: benché scritte in modo accattivante, venivano pubblicate su una carta di pessima qualità (è il caso, per esempio, di *Un uomo e una volpe* di Nilde Cima del 1976, *La macchina*

[56] B. Staniów, *Przekłady z literatur obcych w latach 1945-1989*, in K. Heska-Kwaśniewicz, K. Tałuć (edd.), *Literatura dla dzieci i młodzieży (1945-1989)*, Katowice, Wydawnictwo Uniwersytetu Śląskiego, 2013, Vol. 3, pp. 149-165.

[57] Cfr. K. Biernacka-Licznar, *O historii przekładów włoskiej literatury dla dzieci na język polski do roku 1945*, in M. Woźniak, K. Biernacka-Licznar, B. Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, Toruń, Wydawnictwo Adam Marszałek, 2014, pp. 175-179.

meravigliosa. I segreti del corpo umano di Luciano Sterpellone, uscito nel 1979 o *Tu misuri e io peso* di Angela M. Orazi del 1979).

L'ultima opera italiana uscita nel periodo da noi esaminato è la raccolta di undici fiabe di Paolo Statuti intitolata *Il principe-albero* (1989).

Conclusioni

L'introduzione del modello socialista nella letteratura per i giovani lettori, nonché la decisione, presa dalle autorità statali polacche dell'epoca, di escludere le traduzioni letterarie in vigore prima dello scoppio della Seconda guerra mondiale, spinsero gli editori polacchi a proporre una letteratura giudicata più adeguata ai tempi nuovi. È vero che nel primo dopoguerra si riattivarono alcune case editrici private polacche, ma il loro sviluppo è stato bloccato all'inizio degli anni Cinquanta del XX secolo.

Il mercato postbellico della letteratura per l'infanzia e l'adolescenza fu sin dall'inizio plasmato dall'Instytut Wydawniczy Nasza Księgarnia, un vero magnate nel settore dell'editoria per l'infanzia[58] che riprese la sua attività nel 1945, nel solco della tradizione della casa editrice fondata nel 1921. La casa editrice intraprese abbastanza velocemente una collaborazione con quasi tutti gli autori e illustratori polacchi dei libri per l'infanzia e l'adolescenza, mentre ai dipendenti della redazione della letteratura tradotta fu affidato il compito di interessarsi alla produzione letteraria degli scrittori stranieri, finora sconosciuta ai bambini polacchi.

Nel periodo che va dal 1945 al 1989, la letteratura italiana per l'infanzia e l'adolescenza non occupò un ruolo di rilievo nel numero dei titoli pubblicati dalla Nasza Księgarnia[59] e da altre case editrici. Facendo un confronto tra il numero delle traduzioni da diverse lingue, si possono notare significative sproporzioni fra la lingua italiana e quella russa, francese, tedesca o inglese[60]. Vale la pena notare che la casa editrice Nasza Księgarnia si decise a promuovere i due testi più famosi della letteratura italiana per l'infanzia: *Cuore* e *Le avventure di Pinocchio*.

Che cosa si poteva scegliere di più dall'offerta della letteratura italiana per l'infanzia e l'adolescenza che fosse conforme con le linee guida dettate dalle

[58] S. Aleksandrzak, *Pół wieku przyjaźni z dzieckiem i szkołą: 1921-1971*, Warszawa, IW „Nasza Księgarnia", 1972.

[59] Biernacka-Licznar, *Serce Pinokia. Włoska literatura dla dzieci i młodzieży w Polsce w latach 1945-1989*, cit., pp. 82-84.

[60] Rogoż, *Przekłady zagranicznej literatury dla dzieci i młodzieży w okowach polskiej cenzury. Ocena książek skierowanych do wydania w latach 1948-1956*, in *„Nie należy dopuszczać do publikacji". Cenzura w PRL*, cit., pp. 99-122.

autorità popolari di allora?[61] La scelta cadde negli anni Cinquanta su autori vicini al partito comunista: Gianni Rodari[62] e Marcello Argilli.

Dall'inizio degli anni Settanta si osserva invece sul mercato polacco l'impegno di Nasza Księgarnia di riportare in luce (in modo abbastanza moderno) i nuovi autori italiani, per far conoscere a un pubblico polacco l'offerta più aggiornata delle novità italiane. Il monopolio dello Stato garantì all'editore i mezzi di sostentamento sufficienti[63] per la pubblicazione delle opere tradotte, ma il passaggio dalla letteratura per l'infanzia classica italiana all'offerta contemporanea con uno sguardo più ampio, per far vedere al pubblico i cambiamenti avvenuti nella letteratura italiana, non sortì gli effetti sperati: i libri pubblicati non ebbero eco e non si hanno fatto notare nel mercato editoriale (tranne Gianni Rodari e Luciana Martini).

La riflessione finale che si imponga a chi voglia guardare con l'attenzione l'evoluzione della traduzione della letteratura italiana in Polonia fino al 1989 è quella che nell'immaginario dei lettori polacchi furono presenti soltanto due classici della letteratura italiana, *Le avventure di Pinocchio. Storia di un burattino* di Collodi e *Cuore* di De Amicis, grazie alle numerose riedizioni e alla loro inclusione nella lista delle letture scolastiche (prima *Cuore* e dal 1982 anche *Le avventure di Pinocchio. Storia di un burattino*).

L'introduzione nel mercato polacco della nuova produzione italiana fu guardata con curiosità e con interesse e i redattori delle case editrici nell'epoca esaminata (1945-1989) cercarono di offrire al giovane pubblico polacco lo sguardo sulla realtà italiana proponendo una scelta di autori nuovi. Tuttavia il passaggio dagli autori classici ai nuovi non è stato agevole soprattutto perché il catalogo delle opere italiane proposte non era molto originale. Le pubblicazioni non furono numerose, non si impressero nella memoria dei lettori polacchi, e nella maggior parte dei casi gli autori proposti non furono in grado di conquistare il giovane pubblico polacco e di garantirsi un posto permanente nel canone letterario polacco, come è successo con Collodi, De Amicis e Rodari.

[61] Ne parla Bogumiła Staniów nel capitolo intitolato *A jednak Pinokio! O literaturze włoskiej dla dzieci w Polsce w latach 1945-2012* [*Eppure Pinocchio! Sulla letteratura italiana per l'infanzia nella Polonia degli anni 1945-2012*], pubblicato nel 2014 nella monografia di Woźniak, Biernacka-Licznar, Staniów, *Przekłady w systemie małych literatur. O włosko-polskich i polsko-włoskich tłumaczeniach dla dzieci i młodzieży*, cit., pp. 228-268.

[62] «La carriera di Gianni Rodari come scrittore inizia nel 1951 con la pubblicazione del suo primo testo per ragazzi dal titolo Il libro delle filastrocche; nello stesso anno l'autore pubblica Le avventure di Cipollino che, pur passando quasi sotto silenzio in Italia, viene, invece, tradotto con successo in russo, consacrando il nome di Rodari alla storia della letteratura per l'infanzia». Cfr. P. Boero, *Una storia, tante storie*, Trieste, Einaudi Ragazzi, 2010.

[63] D. Świerczyńska-Jelonek, G. Leszczyński, M. Zając (edd.), *Po potopie. Dziecko, książka i biblioteka w XXI wieku. Diagnozy i postulaty*, Warszawa, Wydawnictwo Stowarzyszenia Bibliotekarzy Polskich, 2008, p. 189.

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Learning in the *Zibaldone* by Leopardi

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ABSTRACT: Several acute observations of a pedagogical nature are present within Leopardi's immense output. Among the themes dealt with by the poet, the habituation theory concerning human learning, elaborated in the early 1820s and featured in the *Zibaldone* pages, is indeed relevant. Habituation is a slow process, by which new mental attitudes and results of the most diverse nature are acquired. Leopardi assigns great importance to exercise and to individual willpower. This reflection by the poet, surely conditioned by his own personal scholarly path, may be helpful for current reflection on didactics, in some notes about learning how to write elegantly; the latter was a personal goal of significant importance for Leopardi.

EET/TEE KEYWORDS: Habituation; Learning; Leopardi; Italy; XIXth Century.

Pedagogy is almost absent within the huge amount of studies on Leopardi. Research is always motivated regarding the author of poetry and prose, although interest for the philologist, the philosopher and the politician is not lacking. This void demands adequate recognition, capable of shedding light on such lucid and profound, albeit scattered thinking devoid of an overall pattern, strewn throughout a multitude of theoretical areas. Leopardi's reflections deal with very different themes, such as idealised childhood, national education for Italian youngsters, critique on the pedagogy being used and training in savoir-vivre, as well as the crucial issue of learning, meaning the way in which the mind acquires a new shape and new contents. This final theme thoroughly engages the poet due to practical and personal reasons, for it is linked to his intellectual world and artistic creation. It was not fortuitously faced in the early 1820s, when the desire to improve his studying methods was much alive. Such analysis found its space within the brimming pages of the *Zibaldone*[1], that

[1] Passages of *Zibaldone* quoted in the present paper are copied out from this accurate, first full English version: G. Leopardi, *Zibaldone*, Farrar, Straus and Giroux, New York, 2015; edited

extraordinary archive of thoughts not meant for printing, but for mere private use, which was published posthumously at the end of the Nineteenth century. Leopardi particularly pauses over the crucial concept of *habituation*, the true pivot on which he elaborates his theory; this notion, never directly defined in the *Zibaldone*, has a meaning equivalent to that of "habit" and is analysed with great care in its most diverse aspects. Whilst deeply influenced by personal experience, this theory offers valid cues for reflection to present-day didactics; it offers keen intuitions and precise observations, surely valuable for understanding the life of the mind. It should be added that such elaboration takes place in the early Nineteenth century, within an epistemological context which was not yet marked either by experimentalism, or by scientific psychology discoveries. This is certainly in its favour, since there was no theoretical certainty about learning at the time, but just a few convictions about traditional teaching; moreover, his position is suffused with empiricism and Eighteenth century materialism and naturalism.

1. *Habituation*

Even before examining the dynamics of habituation, a seminal idea needs to be identified: a human being can undergo great transformations thanks to exercise, repetition, habit and repeated use. «Conformability», a peculiar human capability which allows a modification, adaptation and acquisition of the most varied and novel forms, is at the root of everything[2]. This capability is more or less extensive depending on age, so assuming new habits and implementing new learning is much easier for a child. In clarifying its nature, Leopardi adopts a classic metaphor in pedagogical language: the pupil like initially soft "wax", which gradually hardens.

> Each man is like a soft dough, susceptible to every possible shape, impression, etc. It hardens over time, and at first it is difficult, and finally it is impossible to give a new shape, etc. Such in each man, and such he becomes as he grows older. This is the characteristic difference between man and other creatures. Their greater or lesser original *conformability* is the principal difference in nature between the different species of animal, and between the different individuals of one and the same species […] Nature has left more to do for their lives to those beings to which it has given greater conformability, that is, qualities and faculties which are more easily modified, diversified, and developed in various different

by Michael Caesar and Franco D'Intino; translated from the Italian by K. Baldwin, R. Dixon, D. Gibbson, A. Goldstein, G. Slowey, M. Thom and P. Williams.

[2] About this subject it has to be mentioned A. Aloisi, *Desiderio e assuefazione. Studio sul pensiero di Leopardi*, Pisa, ETS, 2014.

ways, and capable of producing more diverse and more numerous effects although they do not produce them in their natural state. Such is man above all others[3].

This thought stresses the nature of conformability and underlines the high moulding potential at the base of every habituation. In clarifying the «supreme conformability» of man, both in the mental and in the bodily sphere, Leopardi provides a few eloquent instances, such as the remarkable achievements of the «people who are blind, whether by nature or having become so», of the «deaf» or of «the one born without arms, who compensated with his feet for all the functions of the hands, even for the most refined»[4]; «a hundred thousand other extraordinary moral or physical faculties possessed today or in times gone by individuals, or races, or particular nations, simply through force of circumstances, or through practice, or through customs, etc.»[5] must also be recalled. Another example of great conformability is given by performances of «Indian jugglers», of «Mexican jugglers» as well as those «of our tumblers, acrobats, and also conjurors»[6]. According to Leopardi, changes in human beings may always be explained by their plastic, flexible nature. In life, this possibility is of great practical value; after all, every outcome, every new ability, every further form is a result of exercise, of habit, of habituation. New forms are created slowly and gradually; in fact habituation is «a second nature and develops almost unconsciously, adding or destroying innumerable qualities, which, once they are acquired or lost, we quickly persuade ourselves that we cannot have or that we cannot not have, and we ascribe to eternal, immutable laws, to a natural system, to Providence, etc., what is actually the work of chance and arbitrary and accidental circumstances»[7]. This process explains a great number of situations; moreover, it greatly aids living, adapting to the world and soothing pain, as the life of prisoners well demonstrates. Leopardi considers the case of boredom and recalls his personal experience.

> Habituation will alleviate any ill, and with enough practice man can become accustomed to absolute, total boredom and find it much less unbearable than he did at first. I myself am proof of this. At first boredom drove me to despair, but then, as it increased instead of diminishing, habit little by little made it less frightening to me and more susceptible to patience[8].

The disquiet felt when changing opinions is also due to habituation; each new idea becomes rooted only after a long time, since it encounters resistance within what is already accepted and consolidated. In referring to his ideas, Leopardi

3 Leopardi, *Zibaldone*, cit., pp. 1452-1453.
4 *Ibid*., p. 3824.
5 *Ibid*., p. 3825.
6 *Ibid*.
7 *Ibid*., p. 208.
8 *Ibid*., p. 280.

foresees that «if the truths that I establish should have the good fortune to be repeated, and minds become accustomed to them, they will be believed not so much because they are true but because of habituation»[9]; this is therefore the manner in which an idea is established; indeed, «No opinion, true or false but contrary to the dominant and general opinion, has ever been established in the world instantaneously, and by virtue of a lucid and palpable demonstration, but by virtue of repetitions and hence of habituation»[10]. But what stimulate the poet most, are some practical aspects of habituation, such as intellectual attainment, artistic creation and, above all, skill in writing. Leopardi was particularly sensitive to this, especially in his early years, as demonstrated by a thought dated August 1821.

> You can also see how everything is habituation in living creatures in the effects of reading. A man becomes eloquent by dint of reading eloquent books; he becomes inventive, original, a thinker, a mathematician, a reasoner, a poet, by dint of, etc. […] Novelists whose fecundity, etc., of invention astonishes us have for the most part read a great quantity of novels, stories, etc., and their imagination has thereby acquired a faculty that any intelligence, in comparable outward circumstances and irrespective of its nature, would be capable of acquiring, to a degree that is at least similar[11].

There is here a concise illustration of the process, of the causal link between repeated contact with authors, ideas and methods of writing, and acquiring corresponding skills[12]. Leopardi also explains human ingenuity; initial differences actually count little, compared to how much exercise can do. After all, ingenuity «is ease in contracting habit» and this ease «includes ease in changing habits, in contracting new ones to the detriment of past ones, etc. it follows that great intellects must be ordinarily be extremely mutable (in opinions, tastes, styles, fashions, etc.), not as a result of the sort of volubility which arises out of frivolity, which in turn arises out of limited strength in intelligence and conceptions and sensations, etc., but as a result of the facility to contract habit, and hence to progress»[13]. This position fully emphasises willpower, commitment and individual effort, thus setting aside the idea of a natural gift; indeed, «Even supreme intellects in their very earliest stages are more or less at the same level as markedly inferior intellects at the same stage. From this it is clear that a great mind is only forged through practice and habituation»[14]. Thus, mental life coincides with this phenomenon capable of explaining human affairs; individual differences are not excluded, of course,

[9] *Ibid*., p. 1720.
[10] *Ibid*.
[11] *Ibid*., pp. 1540-1541.
[12] About this theory it is necessary to mention M.T. Gentile, *Leopardi e la forma della vita*, Rome, Bulzoni, 1991.
[13] Leopardi, *Zibaldone*, cit., pp. 1450-1451.
[14] *Ibid*., pp. 1451-1452.

but these consist mostly in needing more or less exercise. A question of practice, therefore, as he clarifies very well in another note from the *Zibaldone*.

There is no man so little inclined and ill-equipped to *learn*, or to learn a particular thing, who, after very long practice in any discipline and aptitude of either mind or hand, etc., may not master it better or at least as well as the greatest intelligence, etc., who is beginning or has very recently begun to practice it. This is what a difference in intelligence comes down to. Some require more practice, others less, but in the end all are capable of the same things, and with stubborn application the dullest intelligence can become one of the foremost mathematicians in the world[15].

Individual differences therefore reside in having «organs better arranged, or generally more easily habituated» so as to manage «to acquire that ability in a shorter time than others»[16]; therefore ingenuity consists in having «organs easily habituated, that is, flexible, adaptable, etc.»[17]. Differences are thus caused by higher or lower abilities in learning in diverse individuals[18]. According to Leopardi, talent «is nothing but the faculty of learning, that is, paying attention, and becoming habituated»[19]. With the term "learning", he also intends «the faculties of inventing, thinking, feeling, judging»; therefore every faculty is obtained by acquisition.

No one learns his own inventions, thoughts, feelings, or the particular judgments he brings to bear, but learns to do so, and cannot do it if he has not learned to do so, and if with a greater or lesser exercise and abundance of sensations, that is to say, of experiences, ha has not acquired such faculties, which appear to be wholly innate, and are in reality acquired more or less readily[20].

At this point, it is quite evident how this vision privileges the ontogenetic aspect; nature on the contrary only plays a secondary role, everything having to be explained through exercise. The poet does grant a role to nature, but in terms of a possible attitude which however needs to be developed.

In the case of many human faculties that are considered natural, or almost so, or willed by nature, etc., one will see, if one considers them carefully, that nature did not place in man even (so to speak) the disposition toward them, that is, a definite, direct, nearby disposition, but one so distant that it is practically only a *possibility*. So it is. Those human faculties in regard to which man owes nothing to nature other than the purest possibility of acquiring them, and contracting them, are infinite and very common and everyday[21].

15 *Ibid*., pp. 1632-1633.
16 *Ibid*., p. 1254.
17 *Ibid*.
18 The following essay can be suggested, A. Tilgher, *La filosofia di Leopardi*, Bologna, Boni, 1979.
19 Leopardi, *Zibaldone*, cit., p. 1661.
20 *Ibid*.
21 *Ibid*., p. 2152.

This thought strengthens the role of habituation even further and beckons further ahead, to view its important pedagogical implications. Looking more closely, Leopardi takes a very clear position and confers much value to willpower, constancy and individual commitment as well as the cultural context, while granting a much slighter role to the hereditary and genetic aspect of intelligence. Quite far from inherence theories, this pedagogical thinking is modern, distant from forms of cultural elitism, and it welcomes the human possibility of learning, improving and perfecting oneself through exercise, with much favour. Not only. Unlike other parts of his pedagogy[22], Leopardi shows a lively optimism and supports the changeability of man and, therefore, his teachability, with enthusiasm. This reflection is no less modern in a social and educational sense; in fact it excludes a link between ingenuity and social class, stating that «it is certain that among the paesants there are as many people suited to becoming geniuses as there are in other classes, in proportion to the respective numbers of each class»[23]. This is an open and progressive idea, especially within the cultural framework of the early Nineteenth century, although it ought to be remarked that it does not plunge any further forward, inasmuch it does not consider the social factor onus on the result.

What needs to be remarked is the causal link between habituation and its subsequent goal. It means full confidence, in a pedagogical key, in the training process, in being able to reach results that are proportionate to the action carried out. The echo of Comenius' theory is also recognisable, on several points, because of the considerable, perhaps excessive confidence in method, and in being able to educate anyone, without limits of any kind, as attested by a passage dated November 1821.

> Human intelligence is only habit, human faculties pure habits, all of which can be acquired by all, albeit more or less easily, with longer or shorter habituation. It means that a given man is, starting in boyhood, or for a long time, trained in and habituated to that type of knowledge, and skill, and owes this skill purely to the circumstances through which he has become habituated[24].

[22] Leopardi was rather skeptical and pessimistic on other pedagogical points. For example, when he claimed that the customs of the world would still make youngsters evil despite top education. Resignation is also visible where he considers birth and early education; parental care should be seen as reparation, a compensation for the child, as it did not ask to be born. Great perplexity is shown towards study, an activity which makes one feeble, rather unenthusiastic, rather unsociable, badly adapted to the world. Leopardi strongly opposed the method used, based on effort, memory, punishment and pedantry and hoped, on the contrary, for a practical education, close to nature and based on experience. He was also very contentious towards teachers, whom he judged ill-trained, unprepared and unable to understand the nature of youngsters. Finally, in making a comparison, Leopardi judged the ancients' education as being much preferable to the current one, as beings free, virile, and based on example and practice. On the whole, one may speak of a real anti-pedagogy trend.

[23] Leopardi, *Zibaldone*, cit., p. 1647.

[24] *Ibid*., p. 2163.

An echo suggested by this confidence in managing to achieve any capabilities, particularly due to their being *all acquirable by everyone*, thus highlighting the methodological and procedural aspect, that is, the validity of pursuing a stated outcome with the most appropriate exercise.

2. *A self-centred theory*

It is interesting to note how the capacity for habituation may be increased thanks to practice; in fact, «Not only is every one of man's capacities a capacity to become habituated, but the capacity to become habituated itself depends on habituation. By dint of habituations one acquires ease in becoming habituated, not only within one and the same kind of things, but in every kind»[25]. Therefore, habituation should be seen as a self-nurturing circular process, in the sense that the more one is habituated, the more further habituations are acquired. For Leopardi «habituation comes from habituation. The faculty of habituation, from having become habituated»[26]; this applies to both the spirit and the body, as another note clarifies in September 1821.

> Someone who has acquired more habituations or faculties, or has acquired this one or that one to a greater degree, someone, in short, who has habituated and exercised his body more or better, acquires other habituations and faculties, including those which initially seemed completely alien or extremely difficult to his *nature*, etc. etc. etc.[27]

These are words indicating a sort of facilitation, of a virtuous circle, due to which those who are most learned are facilitated in further learning. Once again, the value of commitment and willpower within a training path is thus repeated. The notion of "imitation" within the learning theory is no less decisive, and deemed similar to the one of habituation. Leopardi evaluates it very favourably and stresses its fruitful role; a faculty for imitation is «one of the principal parts of human intelligence», which «is none other than a capacity for paying careful and scrupulous attention to the object and its parts, and a capacity to become habituated»[28]. In illustrating its nature, the poet makes use of introspection and of deferred memory, so as to better support his speech.

> Take my own case. After a single reading I succeeded in adopting a style, because my imagination immediately became accustomed to it, and I could rework it, etc. So, too, when reading a book in a foreign language, I would immediately become accustomed, in the

[25] *Ibid*., p. 1370.
[26] *Ibid*., p. 1683.
[27] *Ibid*., p. 1727.
[28] *Ibid*., pp. 1364-1365.

course of the same day, to speaking, even with myself and without realizing it, in that same language[29].

Here, as elsewhere, the footprint of autobiographical data within theory is visible; many thoughts are founded on his cognitive experience[30]. Indeed, the empirical basis for his theorisation is his own educational path, a successful, prodigious exercise in study and learning. Indeed, this is the first, fruitful field of observation in which Leopardi gathers keys for formulating his speech. A learning theory which may be scantly generalised is the result, because it is bound to his own private case. What Leopardi notices within himself does not stand for others, and therefore cannot be extended, unless with much caution. In the end, this is the most considerable limit in a theory born of his own experience, even more so because it is finalised to his artistic creation. So, a self-centred theory, valid for a fairly uncommon wit. His great capacity for assimilating new content, for mastering foreign languages in a short time, for learning with extreme ease is well-known; here is how he relates his prompt, swift habituation.

I in my meager intelligence have recognized no other difference from vulgar intellects than the ability to accustom it with ease to whatever I wished, and when I wished, and for it to contract a sturdy, well-rooted habit in not much time. So that if I read a poem, I easily become a poet; if I read a logician, a logician. If I am reading a thinker I acquire the habit of thinking straight away in the space of a day; if I am reading a particular style, I can imitate it immediately or very quickly, etc. I can get the habit of a stylistic trait that seemed to me fitting in a short space of time, etc. etc.[31]

With these words, Leopardi underlines his distance from *ingegni volgari* or crude wits, and describes his exceptional capacity for learning. The development of this process is the same, in any case, for any one, because there is always contact with topic, model and author, although the speed of habituation does vary, in his case. In other words one may speak of impregnation, more or less rapid according to the individual. In the life of the mind, the capacity for easily un-learning what is already learnt, is no less important; this inverse process is due to conformability, and may be remarked in great minds: «To be able to contract a habit with ease is an essential quality and effect of great minds and carries with it, as a natural consequence and effect, a facility to undo already contracted habits with the help of new, easily acquired, contrary habits»[32]. Therefore, ease in inuring oneself corresponds to its opposite, holding the same principle at its basis. Leopardi thus pinpoints the relationship between inuring

[29] *Ibid*., p. 1365.
[30] About Leopardi's life, it has to be mentioned Gioanola E., *Leopardi, la malinconia*, Milan, Jaca Book, 2005.
[31] Leopardi, *Zibaldone*, cit., pp. 1254-1255.
[32] *Ibid*., p. 1254.

and un-inuring oneself; both depend upon a more general capacity for changing oneself, in one way or another: «The power of general habituation makes it gradually ever easier to become dishabituated, and to pass from one habituation to another, different or contrary one. This in individuals, in nations, and in mankind»[33]. Indeed, this capacity is very useful in scholarly activities, which also benefit from another one, imitation. As we have seen, Leopardi views the capacity for imitation favourably; it is linked to learning and denotes a mind ready to comply and to change, both in learning, both in un-learning.

> I will always have high hopes for a boy who displays this facility in the slightest things, who is exceptionally given to imitation, who quickly and easily contracts the manners, pronunciation, etc. etc., and even the defects of those with whom he lives, who quickly shakes them off and loses them according to the novelty of his circumstances, etc. etc., who when he is transported to a new place or a new circle adopts its virtues or vices immediately[34].

Again, this is a pedagogical fragment which may be inserted within a broader theoretical framework sketched in discontinuous traits, and without a systematic aim. At this point, in order to understand Leopardi's reasoning better, it may be beneficial to establish its true reasons. The dynamic of habituation is not conceived in view of a more finished pedagogical theory, is but finalised for his own intellectual itinerary. His literary vocation is therefore at the root of so much interest. It is not by accident that great part of his thoughts on this theme was jotted down in youthful years, when the poet was thinking intensely about his artistic creation. Therefore, the pedagogical concern is not faced in view of formulating an educational theory, but coincides with a more circumscribed issue regarding personal convenience. A proof of this is also the fact that the *Zibaldone*[35], as conceived, was not destined for the public, but for mere private use[36]. The true sum of his theorisation is thus practical and autobiographical. While self-centred, Leopardi's formulation however offers a broad, accurate explanation for the learning phenomenon, thus providing useful hints for a current reflection on didactics as well. It must be pointed out that Leopardi is not a pedagogist, strictly-speaking. His theoretical priorities are other ones; his meeting with pedagogy is sometimes casual, or is propitiated by a personal need – as in this case – or by other problems benefiting from the aid of this epistemic ambit. Therefore, there is no intention of structuring either a general or a specific theory on method, or on didactics. In spite of this, it is possible in

[33] *Ibid*., p. 1824.

[34] *Ibid*., p. 1553.

[35] The *Zibaldone di pensieri* contains notes written from July 1817 to December 1832. Published posthumously in 1898 in 7 volumes by Le Monnier editors under the title *Pensieri di varia filosofia e di bella letteratura*, it was to be re-published in 1937 by Mondadori editors under the original title chosen by Leopardi.

[36] The following study can be suggested, *Lo Zibaldone cento anni dopo. Composizione, edizioni, temi*, 2 vols., Florence, Olschki, 2001.

his entire verse and prose production, as in the great quantity of fragments on education, to outline a pedagogical speech marked by several thematic cores, amongst which habituation is certainly one of the most consistent ones.

3. *Habituation to good writing*

Within Leopardi's pedagogy, speech on habituation may be fully defined as being of a didactic nature. Certain parts of the *Zibaldone* are, no more, no less, precise practical indications circling this conceptual nucleus, capable of explaining every aspect of mental life. The fact that for Leopardi «Learning is simply becoming habituated»[37] should not be surprising, just as «Teaching is almost the same as habituating»[38]; moreover, «Man gets habituated to being habituated, and learns to learn, and needs to do so»[39]. In the poet's thought, didactics thus often coincide with this process. Not only. For a scholar, the capacity for habituation is so valuable, so decisive, because it is the foundation for any learning. By analogy, the present theory of sociologist Niklas Luhmann, the creator of the slogan *learning to learn* springs to the mind, a practical answer for adapting to an ever faster world, where knowledge useful today is already superseded after a short time, which fact leads to emphasising method, not so much as contents. When Leopardi ponders more closely on education, he stresses how easy it is to learn during childhood; indeed, now one is able to do so amazingly, while it will not be so easy further ahead. Every child needs more or less intense exercise, because education rhythms, timing and modes are totally individual, but everybody has great potential nevertheless.

> There is almost no possible skill of which any child is not capable with more or less practice, and that he is also capable of succeeding in, in the most perfect manner possible. But once childhood is over the dispositions of the organs very more, due to the greater or lesser *general* capacity the individual has contracted, through more or less practice, which itself gives rise to a greater or lesser capacity to contract habits, etc., and to learn[40].

A distinct admonishment ensues: the pupil must be followed with great care at this age, because the moment is very favourable, to be fully exploited. This idea is developed more broadly when the poet deals with an aspect he holds dear: teaching to write, to express oneself with style. There is a part in the *Zibaldone* where Leopardi highlights the didactic helpfulness of writing down

[37] Leopardi, *Zibaldone*, cit., p. 1255.
[38] *Ibid*., p. 1727.
[39] *Ibid*., p. 2028.
[40] *Ibid*., p. 1433.

one's ideas. According to him, this sort of exercise is very fruitful in forming a youngster, provided ideas be personal.

So necessary is this practice that I will, on the one hand, lavish praise upon, and, conversely, place the highest hopes in, a child or youth who, when setting out to write and compose, always follows his own ideas, and seeks at all costs to express then, even if they are frivolous, as is only natural with those who are just beginning to reflect, and poorly expressed, as is natural with those who are just beginning to write and to apply signs to thoughts. It seems to me that I was one of these[41].

The autobiographical fact at the end, supporting his theory, should be remarked here too. The goal of knowing how to write well appears several times within his didactic concept. This was a genuine, profound anxiety for the young poet, a goal which he devoted his best energies to. He thus talks of this highly competently, even though his concept feels the effect again here of his exclusive, private case, impossible to propose. In order to write elegantly it is essential to read works by certain authors, so this prior choice is vitally important. To this end, in 1827 and in 1828 Leopardi compiled two anthologies[42], the prose and poetry *Crestomazia italiana*, in which he selected excerpts by Italian poets and narrators from various centuries; highly valuable excerpts in style, valid as reference models for composing. For a good education towards writing, selecting one's reading is a fundamental aspect. A note in the *Zibaldone* clarifies the need for frequenting only certain authors and avoiding other ones. Only thus can habituation truly be considered fruitful; indeed, «It can be readily observed that when we are composing, etc., our work is greatly helped and made easier, etc., if we regularly read at the time authors whose style, subject, etc., is analogous to what we are working on, etc.»[43]; in the long run, the habituation process confers given mental habits, so it is very important to discard any non-appropriate reading.

In the act of composing, one should avoid readings that are bad in terms of style or anything else. Because, without being aware of it, the mind becomes habituated to those styles, even

41 *Ibid*., pp. 1544-1545.

42 The *Crestomazia Italiana dei prosatori* was published in Milan in 1827 by Stella editors. This work gathers 300 excerpts by 80 authors and features 13 sections, differentiated by thematic genre. The *Crestomazia poetica*, published in 1828, also by Stella, is an anthology of poetry by Italian authors from the Fifteenth to the Nineteenth century. It should be pointed out that in the prose *Crestomazia* Leopardi warns readers that the anthology was compiled so as to «both serve young Italian scholars of the art of writing, and foreigners who wish to exercise themselves in our language»; moreover, its aim was to please and benefit «not only youngsters, but also grown men; and not only scholars of the art of writing, or language, but any type of readers». In the poetry *Crestomazia* his invitation to readers is less categorical, and for authors from the Nineteenth and the late Eighteenth century he suggests seeking sentiments, philosophical thoughts, inventions and poetic spirit within it, but not examples of fine language, nor fine style.

43 Leopardi, *Zibaldone*, cit., p. 2228.

if it condemns them, and even if it is already used to different styles and has formed a style of its own, solidly rooted in the writer's own habits, etc.[44]

At this point, it is clear how a crucial didactic (and hence pedagogical) issue is that of learning to write well, a skill which may be achieved thanks to habituation, thus through time and the constant, careful reading of "model" authors, as well as daily exercise in writing. A skill to attain with a lot of patience, especially at the beginning, because «Man finds it very hard at the beginning to become habituated, to assume this or that form, then by means of his becoming habituated to doing this, he gradually acquires some facility in it»[45]. It should be remarked for thoroughness, that Leopardi does not only consider narrative competence and learning as new knowledge, but also examines other aspects of education. He does not neglect physical exercise, which brings novel training and new abilities, nor does he neglect observing the effect of habituation on socialisation; here too, it is daily practice and the habit of staying with others, which confers sociability.

A man who has had few or no dealings with others, or who has had no dealings for a long time, finds it very hard, indeed, simply does not know how to accommodate himself to the different characters, temperaments, tastes, customs of people, places, times, occasions. He is therefore not at all sociable. With a man used to engaging with men it is just the reverse. He adapts at once to the new character, etc.[46]

Concluding, habituation constitutes one of the strong cores of Leopardi's pedagogy. This reflection by the poet flows in several instances within the *Zibaldone*, this extraordinary mine of ideas. In measuring himself against this theme, Leopardi takes habituation, the cardinal concept on which he focuses his theories, into account. This so very fruitful, decisive phenomenon, capable of explaining the most diverse results of man, is finely analysed in its various aspects, generating a theory on learning which seems to herald the most modern theories on conditioning. Didactics and methodology descend from this, which, while being conceived for self-use, contain hints and suggestions that are still certainly valid nowadays for better planning teaching, its methods and the entire formation of man; furthermore, Leopardi's reflections offer more than one useful indication for composing, in prose and in verse. Basically, the problem of writing was the real reason that led him to tackle this theme. As much as it is appreciable and penetrating, this theory presents a limit which is anything but negligible: its glaring link with his own life and with his own intellectual experience makes it self-centred and not susceptible to generalisations, also because his own is an extraordinary, unrepeatable itinerary, carried out by a mind of the highest genius. In any case, it is not possible to complain about the

[44] *Ibid*., pp. 2229-2230.
[45] *Ibid*., pp. 1682-1683.
[46] *Ibid*., p. 1683.

absence of a finished theory on education, formulated according to customary canons. Giacomo Leopardi was not a pedagogist, nor did he aspire to be one; his theoretical priorities were certainly other ones, although his genius was not able, anyhow, to not deal with the crucial problem of man's education.

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Adapting fairy tales through an islamic lens: a study of Gilani-Williams' *Cinderella: An Islamic Tale*

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ABSTRACT: Fairy tales contain allegorical plots that portray real life events and are powerful enough to shape people's attitudes. However, some elements included in them may not be appropriate for young readers who have not developed a sufficient moral compass to differentiate the good from the bad. In order to protect children from untoward influences, it is perhaps important to adapt the plots by making some amendments, removing and replacing the not-so-relevant elements with ones that suit children's imaginations and promote good values. Hence, Fawzia Gilani-Williams brings in Islamic perspectives in children's literature. She seeks to produce alternative versions of tales to make them compatible with Islamic

teachings and appropriate for children. In this paper we examine her *Cinderella: An Islamic Tale (2010)* and compares her adapted story with Perrault's *Cinderella (1697)*.

EET/TEE KEYWORDS: Children's literature; Fairy tales; Charles Perrault; Cinderella; Fairy tales for Muslim children; XVIIth-XXIst Centuries.

Introduction

The fairy tale as a literary genre is popular and is enjoyed by readers around the globe. In the past, fairy tales were meant for sharing among adults at gatherings[1]. In the late seventeenth century, Italian tales were mainly famous among peasants and the lower class in France[2]. Members of spinning circles frequently invented and shared stories among themselves within an oral storytelling tradition when they were working in workrooms[3]. Eventually, this oral storytelling tradition led to the popularisation of folktales among the aristocrats and the middle class who initially belittled them. However, they celebrated these tales after Louis XIV's court and prominent Parisian salons enjoyed listening to folklores. Hence, the number of people who enjoyed these fairy tales grew.

During these periods, power and oppression were the central themes of folktales, as they were mostly about monarchy and patriarchal, feudal society. As a pagan or non-Christian art form, folktales rarely mentioned the lives of the middle class or members of the church. There were no stories about industrialisation and there were no detailed descriptions of commerce and town life. The foci were class struggle and struggle for power. Most peasants were attracted to the tales which inspired them in a way that «*He* who has power can exercise *his* will, right wrongs, become ennobled, amass money and land, and win women as prizes and social prestige»[4]. Besides, in the stories they weaved, storytellers presented brutalities of everyday life of that era such as rape, exploitation, starvation and the abandonment of children. Folktales at that time encouraged people to support the notion that power overpowers morality[5].

Even though fairy tales are usually associated with imaginary and supernatural beings, such as, evil stepmothers, elves, witches, goblins, giants, talking animals

[1] M. Tatar, *The Hard Facts of the Grimms' Fairy Tales*, Princeton, New Jersey, Princeton University Press, 1987, p. XXVI.

[2] J. Zipes, *Fairy Tales and the Art of Subversion: The Classical Genre for Children and the Process of Civilization*, 2nd ed., New York, Routledge Taylor & Francis Group, 2006, p. 3.

[3] Tatar, *The Hard Facts of the Grimms' Fairy Tales*, cit., pp. 112-113.

[4] Zipes, *Fairy Tales and the Art of Subversion: The Classical Genre for Children and the Process of Civilization*, cit., p. 7.

[5] *Ibid.*, p. 8.

and other mystical creatures, their plots have allegorical significance, as they portray many aspects of everyday life. Readers can benefit from such stories that are influential enough to shape one's perceptions and attitudes. However, not all elements included in these stories are appropriate for young readers who have not developed a sufficient moral compass to differentiate the good from the bad. Hence, there is a need for these tales to be analysed and their lurid and gruesome aspects filtered.

Based on a survey by music Magpie on 2000 parents, Smith[6] reveals that 16 percent of them keep their children from reading specific fairy tales because those stories promote violence and are inappropriate for children's age. However, this may not be the right way to protect children from exposure to objectionable content or materials which pose a risk of harm to their psychological well-being. Even if some stories are kept inaccessible to them, children may eventually come by and read them out of curiosity. Perhaps, a better alternative is to provide them with adaptations or retellings that are finely tuned to children's language ability and educational trajectories.

Muslim parents often resort to Islamic adaptations in which writers incorporate and promote Islamic and moral values. Fawzia Gilani-Williams (1967-) feels the need to bring Islamic perspectives in children's literature because she found out that Muslim children in the West suffered from lack of self-worth[7]. She has authored a series of what can be termed Islamic fairy tales. Through such works, she seeks to produce alternative versions of conventional fairy tales for children and to help young readers become familiar with Islamic teachings. Given this new perspective on children's literature, this paper examines Gilani-Williams' *Cinderella: An Islamic Tale* (2010) and compares her adaptation with the source text, Charles Perrault's *Cinderella/Cendrillon (1697)*. This comparative study focuses mainly on seeing the differences between the plots of Perrault's tale and its adapted variant. It seeks to explore and identify Islamic values that Gilani-Williams promotes through her Islam-compatible version of the story.

Literary Fairy Tales for Children

Initially, folktales – meant only for adults – included elements which could negatively affect children's morals and behaviours. However, for the last two to

[6] C. Smith, *Are Fairytales Outdated and Offensive? We Asked 2,000 parents…*, Last updated: May 10, 2018, <https://blog.musicmagpie.co.uk/2018/05/10/are-fairytales-offensive/> (last access: 20.03.13).

[7] F. Gilani-Williams, *The Emergence of Western Islamic Children's Literature*, «Mousaion», vol. 34, n. 2, 2016, p. 116.

three centuries, they have not been exclusively produced for adults, have been transformed into literary fairy tales and constitute part of children's literature[8]. The idea to transform folktales to literary fairy tales emerged when French writers saw the need to address children as a separate readership group and realised that gruesome stories encouraged children to behave badly.

Fairy tale collectors and writers «purposely appropriated the oral folktale and converted it into a type of literary discourse about mores, values, and manners so that children and adults would become civilized according to the social code of that time»[9]. For that reason, during the period of absolutism, they introduced literary fairy tales that befitted children when French culture aimed to civilise the rest of Europe[10]. French writers carefully modified folktales and turned them into literary fairy tales to provide children with a source of entertainment and guidance on how to mould one's character and behaviour[11]. It was a starting point where people regardless of age read fairy tales, and different literary adaptations of folktales began to blossom.

Aristocratic and educated writers led the development of fairy tales for children. Some male writers like Perrault included a discourse about manners, laws and customs in the new genre of the fairy tales[12]. They sought to educate children through their stories in nineteenth-century Europe and North America. Most of the tales were adapted from Italian tales and from the oral tales of governess and maids by Giovanni Francesco Straparola (1480-1557) and Giambattista Basile (1566-1632). The writers of fairy tales for children made sure to carefully refine the stories before sharing them with people in salons and courtly circles.

Charles Perrault's Adaptation

Perrault is one of many writers who educated children through his *The Tales of Mother Goose* (1697) in which he included a discourse about manners, laws and customs to improve the minds of young people. When he was 15 years old, he fell in love with classical literature, philosophy and religion. Therefore, as he realised that he loved literature, he began to establish himself as a writer and published a number of famous poems and stories.

He became interested in folktales after being a frequent visitor of the literary salons of his niece Marie-Jeanne L'Héritier (1664-1734), Marie-Catherine

[8] Tatar, *The Hard Facts of the Grimms' Fairy Tales*, cit., p. XXVI.

[9] Zipes, *Fairy Tales and the Art of Subversion: The Classical Genre for Children and the Process of Civilization*, cit., p. 3.

[10] *Ibid.*, p. 9.

[11] *Ibid.*, pp. 3, 9, 35.

[12] *Ibid.*, p. 31.

d'Aulnoy (1651-1705) and other talented female writers. Therefore, according to Zipes, by 1696, he started a project of transforming several popular folktales – tales that contained superstitious and magical elements – into moralistic stories[13]. Through this project, he aimed to demonstrate a modern approach to literature and to attract the attention of both children and adult readers. As a result, he published a famous collection of tales which included *Sleeping Beauty, Cinderella, Little Red Riding Hood, Tom Thumb* and other stories.

Almost all the tales mentioned earlier were first included in the Italian collections such as Straparola's *The Pleasant Nights* (1550-1553) and Basile's *Pentamerone* (1634)[14]. Perrault was inspired to adapt these tales after reading a copy of Basile's collection[15]. Bottigheimer[16] discovered that Perrault's *Cinderella* was based on Basile's *Cat Cinderella*. However, in his version, he replaced Basile's protagonist with an ideal heroine in order to make her «a paragon of early modern virtues»[17].

Western Literary Works in Muslim Contexts

As mentioned before, Western writers of fairy tales for children aimed to educate children and adults. However, some Muslims may misinterpret their good intentions and fail to appreciate their educational value just because of religious and cultural differences. However, it is wrong to overgeneralise that all literary works from the West are unsuitable for Muslim consumption. In fact, literary works that reinforce Islamic values can constitute part of Islamic literature regardless of the writer's religious identity or cultural background[18].

A great number of English literary works promote ideas that are in line with Islamic teachings as well as with universally-accepted moral values. Similarly, even though writers such as Perrault and the Grimm Brothers were non-Muslims, many of the ideas in their adaptation of fairy tales are largely compatible with Islamic teachings and must be seen in the context of didactic literature. The Grimm Brothers even called the 1819 edition of their book an *Erziehungsbuch* or an educational manual. As responsible writers who were on a mission to shape children's attitudes, they tried their best to alter the stories to

[13] J. Zipes, *Introduction: The Remaking of Charles Perrault and His Fairy Tales*, in A. Carter, *The Fairy Tales of Charles Perrault*, London, UK, Penguin Modern Classic, 2008, p. XIV.

[14] *Ibid*., p. XV.

[15] R. Bottigheimer, *Cinderella: The People's Princess*, in M. H. D. de la Rochère, G. Lathey, M. Wozniak (edd.), *Cinderella across Culture: New Directions and Interdisciplinary Perspectives*, Detroit, Michigan, Wayne State University Press, 2016, p. 34.

[16] *Ibid*., p. 34.

[17] *Ibid*., p. 34.

[18] M. M. Hasan, *Good Literature and Bad Literature: Debate on Islam and Poetry*, «International Journal of Islamic Thoughts», vol. 3, 2014, p. 52.

be more «pure, truthful, and just»[19]. However, even though their adaptations have educational potential, they may not fit in Muslim societies without necessary amendments and alterations which Gilani-Williams attempted in her Muslim-friendly versions.

As a writer and an educator, Gilani-Williams expresses her disappointment that Muslim publishers were reluctant to publish children's literature that included Western references and settings. Some Muslim writers and publishers of the 1980s restricted Islam to the Arab lands, stories of the prophets and companions of Prophet Muhammad only[20]. Hence, many Muslim publishers rejected the manuscript of her *Cinderella*. The idea of creating in a story a Muslim character who lives in the West was rejected. Eventually, an American editor who was also a Muslim convert accepted the manuscript.

Cinderella: A Popular Classical Fairy Tale

Cinderella, a famous tale for children and adults has turned into a universal story that travelled across the world and through time. Since the tale has been narrated and written many times in different cultures and languages, folklorists have had to struggle to determine which *Cinderella* was the original source text. In fact, it is so famous that many cultures have their own versions of the tale. For examples, in Malay culture, it is *Bawang Merah and Bawang Putih* (Shallot and Garlic), while in Chinese culture, *Yeh-Shen*. Until now, people have always retold and adapted the tales to address different audiences, contexts and purposes. Different adaptations of *Cinderella* carry different messages, interests and values, so the tale cannot be reduced to a single narrative and the protagonist, to a fixed image or culture.

Though it has a very long history, folklorists have identified hundreds of distinct forms of the tale around the world. They searched for tales similar to that of *Cinderella* across cultures and found them shared among Africans, Brazilians, Chinese, Filipinos, Indians, Indonesians, Japanese, Persians, Russians and others. English folklorist, Marian Roalfe Cox (1860-1916) conducted a thorough research and compiled different adaptations of Cinderella stories. She gathered stories that share the same characteristics such as the abused protagonist and a pair of shoes as a way for the hero or the prince to recognise the heroine[21]. After a detailed research, she found that there were 345 variants

[19] Zipes, *Fairy Tales and the Art of Subversion: The Classical Genre for Children and the Process of Civilization*, cit., p. 62.

[20] Gilani-Williams, *The Emergence of Western Islamic Children's Literature*, cit., pp. 114, 116.

[21] M.R. Cox, *Cinderella: Three Hundred and Forty-five Variants of Cinderella, Catskin, and Cap O'Rushes, Abstracted and Tabulated with a Discussion of Mediaeval Analogues and Notes*, London, The Folklore Society, 1893, p. XXVI.

of Cinderella in 1892. As of 1994, Kelley reports that there were approximately 700 versions of Cinderella all around the world[22]. She concludes that due to its nature to adapt to a changing environment, the total number of Cinderella variants has increased steadily. The various adaptations of the tale not only differ culturally, but are also available in different literary forms[23]. Therefore, the exact number of Cinderella adaptations remains unknown, as it continues to evolve even today.

Some researchers believe that it is a tale from China and according to some others, it is a tale by an Italian writer. Some researchers claim that the story comes from Eastern Europe, Indochina and the Near East[24]. Their research shows that the Near Eastern and Indo-Malayan versions spread to Europe and developed into the story with which we are familiar today. However, their research findings contradict those of other researchers because, while some believe that the Cinderella story originated from China, others are of the opinion that Basile is the original writer of the tale. Many believe that Basile's version of *Cinderella* is its first literary form and became popular in the salons. Later, writers such as Perrault and d'Aulnoy wrote other versions and adaptations based on Basile's tale. Various versions of *Cinderella* by Basile, Perrault and d'Aulnoy catered to aristocratic audiences as their adaptations of the famous tale consist of aristocratic imaginaries[25].

However, despite having many adaptations of the tale, Perrault gained the most popularity and received wide recognition as children's literature started to emerge in eighteenth-century Europe. According to Bottigheimer, Perrault was inspired to write his fairy tales after he read a copy of Basile's collection of stories[26]. He altered Basile's *Cat Cinderella* in a way that the protagonist follows his dream character and the heroine practises moral values, as he wanted to depict her as an example of early modern virtues. Later, the Grimm Brothers came with a much darker folktale based on Cinderella entitled *Aschenputtel*. Cinderella soon became an all-time favourite story for children and adults alike and constantly adapted to new genres, forms and media for diverse audiences in Europe and beyond.

Later adaptations of the tale change the image of Cinderella. This is because subsequent writers tend to convey messages that are more suitable and appropriate for contemporary audiences, given that the classical version of the tale was meant more for the aristocratic audience. Though the tale has kept

22 K. Kelley, *A Modern Cinderella*, «Journal of American Culture», vol. 17, n. 1, 1994, p. 87.

23 C. François, *"Cendrillon" and "Aschenputtel": Different Voices, Different Projects, Different Cultures*, in M.H.D. de la Rochère, G. Lathey, M. Wozniak (edd.), *Cinderella across Culture: New Directions and Interdisciplinary Perspectives*, Detroit, Michigan, Wayne State University Press, 2016, p. 110.

24 M. Hennard-Dutheil de la Rochère, G. Lathey, M. Wozniak, *Introduction: Cinderella Across Culture*, in Idd. (edd.), *Cinderella Across Culture: New Directions and Interdisciplinary Perspectives*, cit., p. 4.

25 Bottigheimer, *Cinderella: The People's Princess*, cit., p. 27.

26 *Ibid*., p. 34.

evolving, writers of the nineteenth century onwards have included the same messages in their adaptations of Cinderella which are «personal goodness and virtue merit reward, and that goodness and virtue are, and will be rewarded»[27]. These messages give hope to those who cannot afford to live in luxury. Therefore, the tale becomes a narrative vessel in which ordinary girls can fit[28]. For example, feminist writers created new sets of narrative that contain the same messages for young girls.

As for Gilani-Williams, she uses the tale as a medium to promote Islamic values and address the issue of the othering of Muslims. She also aims to give her readers, particularly children, a sense of belonging. Mainly because of the lack of adequate representation of Muslims in literature, Muslim children suffer from poor self-worth. When Gilani-Williams was a principal of an Islamic school in Canada, her students had a story-writing exercise. However, instead of writing about themselves, their religion and culture, they preferred to give their characters European names and wrote the stories based on Western cultures and settings[29]. Out of eighty stories written by the children, only three stories included Muslim names for the characters. Though they are students of an Islamic school no one «spoke about a mosque, or Muslim country, about fasting or Ramadan, no one mentioned Eid, no reference was made about halal or haram, about praying, about giving zakat»[30]. Perhaps, this is because there are inadequate reading materials for children that talk about Islam or stories that portray Muslim lifestyles. Since the representation of Muslims in literature is still insufficient, Gilani-Williams aims to integrate Islamic elements into Western materials and focuses on religious and cultural hybridity. She feels that it is important for writers to give Muslim children a sense of place in the West. Accordingly, she wrote *Cinderella: An Islamic Tale* where she develops the main character into a Muslim who lives in the West and thus has produced «a literature that demonstrate[s] religious-cultural hybridity»[31].

Therefore, Gilani-Williams seeks to integrate Islamic elements and Western values as she focuses on religious and cultural hybridity[32]. She feels that it is important for writers to give Muslim children a sense of place in the West. In *Cinderella: An Islamic Tale*, she has changed the storyline and transformed the main character into a Muslim who lives in the West and produced «a literature that demonstrated religious-cultural hybridity»[33].

[27] *Ibid.*, p. 21.
[28] *Ibid.*, p. 29.
[29] Gilani-Williams, *The Emergence of Western Islamic Children's Literature*, cit., p. 118.
[30] F. Gilani-Williams, S. Bigger, *Muslim Pupils, Children's Fiction and Personal Understanding*, «Almas International Research Journal», vol. 12, 2010, p. 3.
[31] Gilani-Williams, *The Emergence of Western Islamic Children's Literature*, cit., p. 115.
[32] *Ibid.*, p. 116.
[33] *Ibid.*, p. 115.

From the Blonde Cinderella to the Headscarf-Wearing Zahra

Similarities between Perrault's version and Gilani-Williams' adaptation are obvious, as both writers base their stories on the character of Cinderella. However, there are also significant differences between them. The dissimilarities are due to their cultural differences and their target audiences. As known widely, Perrault wrote his tale for France's rulers and aristocrat audiences – both adults and children[34]. Gilani-Williams' adaptation is intended mainly for Muslim readers, especially Muslim children[35].

In both stories, the protagonists are portrayed as mistreated after their fathers take wicked women as second wives. Later, the protagonists in both adaptations survive and marry princes. Perrault starts his version of Cinderella with a description of a man who marries for a second time as his first wife passed away. Perrault characterises this new wife as «the haughtiest and most stuck-up woman in the world»[36]. Both the man and his new wife have children from their previous marriages. The husband has a lovely and kind-hearted daughter, while the new wife has two daughters that resemble her in every single way.

Gilani-Williams begins her story with a description of a happy family consisting of a rich and noble man, a beautiful wife and a «sweet and gentle, and as beautiful as the crescent moon» daughter called Zahra[37]. In her story, instead of naming her protagonist Cinderella, Gilani-Williams chooses to use a Muslim name, Zahra, which means flower, bloom and a beautiful lady[38]. Such modification in the nomenclature of characters is actually common since most writers of various cultural backgrounds assign different names for the protagonist of the same tale, as Cinderella has many different names in various versions of the story.

Later, as the plot of the story develops, Gilani-Williams informs readers about the death of Zahra's mother, which makes both father and daughter grief-stricken. Unlike Perrault who straightaway introduces Cinderella's stepmother and stepsisters at the beginning of the plot, Gilani-Williams dedicates a whole page to highlight the good bond in the family. Readers come to know about the existence of a stepmother and two stepsisters only in the second page. Gilani-Williams informs readers about the father's second marriage and about her stepmother's and stepsisters' personalities. As in Perrault's tale, in Gilani-Williams', the stepmother brings along with her two daughters to live together with Zahra and her father.

[34] S. Beckett, *Revisualizing Cinderella for All Ages*, in de la Rochère, Lathey, Wozniak (edd.), *Cinderella across Culture: New Directions and Interdisciplinary Perspectives*, cit., p. 255.

[35] Gilani-Williams, *The Emergence of Western Islamic Children's Literature*, cit., p. 116.

[36] A. Carter, *The Fairy Tales of Charles Perrault*, London, England, Penguin Classic, 2008, p. 31.

[37] Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 2.

[38] H.S.A. Hareeri (ed.), *Dictionary of Islamic Names*, Riyadh, Darussalam, 2009, p. 155.

Despite slightly different beginnings of their respective stories, both Perrault and Gilani-Williams end their tales in an identical manner. Both writers carry the story to a happy ending where the protagonist is portrayed as merciful and forgiving. In Perrault's story, the stepsisters beg for forgiveness upon knowing that Cinderella is the beautiful woman that the prince has set his eyes on. Cinderella forgives them «with all her heart» and in return, she wants them «always to love her»[39]. Moreover, she invites them to live in the palace, introduces them to great lords and arranges their marriage so that they can marry on the same day. However, Perrault leaves readers in the dark as he does not tell them of the whereabouts of the stepmother and the consequences of her wrongdoing.

In Gilani-Williams' story, Zahra lives happily ever after with her husband. As for her stepmother and stepsisters, they repent and ask for forgiveness. Eventually, they realise that God rewards those who do good things. Like Perrault's Cinderella, Zahra forgives them «wholeheartedly»[40]. However, Gilani-Williams does not tell readers what happens to the stepmother and the stepsisters after that, whether they are invited to live together with Zahra in the palace or not. Nevertheless, she conveys a strong message that people should avoid doing bad things and reminds her readers that God rewards those who do good. Accordingly, she ends her story with Qur'anic verses taken from from chapter 41, verses 34 and 35, which reads:

> Good and evil cannot be equal. Repel evil with what is better and your enemy will become as close as an old and valued friend, but only those who are steadfast in patience, only those who are blessed with great righteousness, will attain to such goodness [41].

In *Cinderella*, Perrault provides the morality of his tale in designated spaces under subheadings 'morals' and 'the other moral'. Unlike Zahra's, Cinderella's parents do not specifically advise her to be good. In fact, Perrault, as a writer, carries the task of reminding people about the story's moral value through separate paragraphs after the tale ends. According to François, Perrault wants to directly address his adult readers in such a manner[42]. He regards charm as a «true gift of the fairies» instead of fancy ball gowns and fancy hairdos[43]. He conveys another moral value by emphasising that being «intelligent, brave, wellborn and [having] other similar talents given only by heaven» are useless if people do not have a godfather or a godmother to help them[44]. In Gilani-

39 Carter, *The Fairy Tales of Charles Perrault*, cit., p. 37.
40 Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 38.
41 M. Abdel Haleem, *The Qur'an*, New York City, Oxford University Press, 2005, p. 309.
42 François, *"Cendrillon" and "Aschenputtel": Different Voices, Different Projects, Different Cultures*, cit., p. 99.
43 Carter, *The Fairy Tales of Charles Perrault*, cit., p. 37.
44 *Ibid.*, p. 37.

Williams' story, the moral message is conveyed to readers in a straightforward manner, as Zahra's father advises his daughter on his deathbed:

> Follow the Qur'an and the Sunnah, and never miss your prayers. Be patient and humble, always speak gently and share whatever you have with the poor. And know that I love you very much. May Allah protect you and make you a strong Muslim[45].

Both Cinderella and Zahra are portrayed as good role models for young readers. The relationships between the protagonists and their families are very different in Perrault's and in Gilani-Williams' tales. In *Cinderella*, the protagonist's father is absent; and even though her stepmother is cruel, Perrault focuses more on abusive remarks made by the stepsisters[46]. However, in Gilani-Williams' adaptation, Zahra's father dies and the author emphasises equally the cruel actions committed by Zahra's stepmother and stepsisters.

Cinderella arouses the sympathy of readers and is known for possessing good traits she inherited from her mother. Perrault characterises her as «a lovely and sweet-natured girl»[47]. Like her Western counterpart, Zahra is characterised as a beautiful, sweet, gentle, humble, patient, kind-hearted and forgiving. However, in order to make her a good example for Muslim children, Gilani-Williams adds an additional attribute to the list of her qualities, piety[48]. She states that Zahra reads the Qur'an everyday with her biological parents and they never missed any of the five daily prayers. Gilani-Williams' Zahra is different from Perrault's Cinderella; Zahra is Muslim, while Cinderella is not. As a Muslim girl, Zahra takes ablution after she takes a shower, she fasts on the day of '*Arafah* – the day that pilgrims gather on Mount Arafat at the end of the annual Hajj – and wakes up for *sahoor* or late night breakfast before the first light of dawn. She reads few Qur'anic verses, and whispers the *shahadah* (the Islamic declaration of faith) before she goes to sleep. Also, rather than seeking help and being dependent on a fairy godmother, Zahra seeks God's help every time she is in trouble. Thus, Gilani-Williams portrays Zahra as a role model for Muslim children.

As for the stepmothers, in both stories, they abuse the protagonists and are portrayed as evil. Tatar labels these evil stepmothers as «alien intruders» that «disturb the harmony among blood relations»[49]. They show jealousy towards Cinderella and Zahra respectively, as they notice that the two protagonists are better than their respective daughters. The narrator of Perrault's tale tells readers that «[h]er new daughter was so loveable that she made her own children seem

[45] Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 5.
[46] François, *"Cendrillon" and "Aschenputtel": Different Voices, Different Projects, Different Cultures*, cit., p. 103.
[47] Carter, *The Fairy Tales of Charles Perrault*, cit., p. 31.
[48] Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 2.
[49] Tatar, *The Hard Facts of the Grimms' Fairy Tales*, cit., p. 142.

even more unpleasant, by contrast; so she found the girl insufferable»[50]. In Gilani-Williams' adaptation, the stepmother tries to be a loving and caring mother to Zahra, but after she notices «how graceful Zahra was compared to her own daughters», she becomes «extremely jealous» and «darkness grew in her heart»[51]. Perrault does not mention anything about Cinderella's stepmother as he focuses more on the stepsisters. In Gilani-Williams' story however, all evil characters including the stepmother repent and ask for forgiveness at the end.

Both Zahra's stepsisters are proud, selfish, rough and cruel. Her stepmother decides to be mean towards Zahra after noticing Zahra's good character traits – beautiful, elegant, humble, giving, gentle and kind – which contradict those of her daughters'[52]. Cinderella's stepsisters who «took after [their mother] in every way» make fun of Cinderella and call her names like «Cinderbritches»[53]. However, Perrault mentions that the younger stepsister is less spiteful than the older one because she prefers to call the protagonist by her real name, Cinderella.

The protagonists' fathers are completely different in terms of their characters though not much has been mentioned about them in the stories. Perrault does not give much detail about Cinderella's father except that he is a hot-headed man and Cinderella is afraid to inform him about the abuse she receives from her stepmother and stepsisters. Perrault informs readers that even though the father is the head of the family, he is afraid of his second wife. As Perrault states: «The poor girl bore everything patiently and dared not complain to her father because he would have lost his temper with her. His wife ruled him with a rod of iron»[54]. Conversely, Gilani-Williams informs readers that Zahra's father is rich, noble and religious. While Cinderella's father goes missing in the second half of the story without any explanation, Gilani-Williams makes sure not to leave readers in the dark and enlightens them with information about what happens to Zahra's father. She writes that after a few years into his second marriage, he becomes ill and eventually dies. Therefore, readers may not question his authority as a father since he is no longer alive to protect Zahra from being abused.

50 Carter, *The Fairy Tales of Charles Perrault*, cit., p. 31.
51 Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 3.
52 *Ibid*., p. 3.
53 Carter, *The Fairy Tales of Charles Perrault*, cit., p. 31.
54 *Ibid*., p. 31.

Promoting Moral Values through Fairy Tales

As mentioned earlier, Perrault's and Gilani-Williams' stories are set in different societies – Gilani-Williams' in a Muslim society and Perrault's in a Catholic society. Though written for different audiences, they share some identical moral values – those in Perrault's tale are based on Christianity and those in Gilani-Williams' on Islam. Gilani-Williams has retained any moral values and elements in the source text that align with Islamic teachings.

The moral value of forgiveness is common in both the texts. Cinderella and Zahra forgive those who abused them. For example, the kind-hearted Cinderella invites her stepsisters to live in the palace with her. Zahra's decision to forgive her stepmother and stepsisters illuminates people's lives, widens their perspective and renders her abusers penitent and repentant.

Another shared moral value in both the works is the virtue of having a good personality. According to De la Rochère, Perrault leaves a clear message in his tale that good manners and education overpower good looks[55]. In his story, Perrault writes «[b]eauty is a fine thing in a woman; it will always be admired. But *charm* is beyond price and worth more, in the long run»[56]. He continues that without charm, a person will fail. Equally, Gilani-Williams emphasises that the queen and the prince fall in love with Zahra's character, not necessarily with her beauty. In the story, Prince Bilal says, «I saw many young ladies today. But I saw no one with more *taqwa* (piety) and beauty than the girl in the green *hijab*. That is the girl I wish to marry»[57]. The queen is also impressed by Zahra's «graceful speech and behaviour»[58]. Therefore, as a mother, she prays that her son will marry Zahra whom she describes as «the girl who has *iman* (faith)»[59].

Moreover, since her text is written for a Muslim audience, Gilani-Williams includes values that have Islamic undercurrents. She reminds readers that whenever Muslims face difficulties, they remember God and believe in His words. Through her protagonist, she conveys the message that, instead of weeping and asking a fairy godmother for help, Muslims should turn to God. Denied a permission to attend the Eid party, Zahra turns to God and holds on to a Qur'anic verse in order to mend her broken heart – «Not so those who are steadfast and do good deeds: they will have forgiveness and a great reward»[60]. Moreover, Gilani-Williams highlights that when God tests His servant, their *iman* will grow stronger. Therefore, if someone goes through a tough time, they

[55] M. Hennard-Dutheil de la Rochère, *Fairy-Tale Refashioning in Angela Carter's Fiction*, in de la Rochère, Lathey, Wozniak (edd.), *Cinderella across Culture: New Directions and Interdisciplinary Perspectives*, cit., p. 167.

[56] Carter, *The Fairy Tales of Charles Perrault*, cit., p. 37.

[57] Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 31.

[58] *Ibid*., p. 29.

[59] *Ibid*., p. 31.

[60] *Ibid*., p. 20.

need to make *du'a* (supplication) in *sujud* – prostration with one's head on the ground – because it will reach God swiftly[61]. Importantly, even though in the story Zahra has fun celebrating Eid al-Adha, she respects the *adhan* or the call to prayer by remaining silent and quickly performs the prayer[62].

Perrault uses magical elements and creates a fairy godmother to help Cinderella. Every time she strikes her ring, her magic works. For example, she turns a pumpkin into a beautiful golden coach, six living mice into carriage horses, a rat into a coachman, six lizards into footmen. Cinderella's ragged outfit becomes a beautiful dress made from gold, silver and precious stones and finally, she creates a pair of glass slippers[63].

However, in her adaptation, Gilani-Williams replaces the magical characters in Perrault's tale with actual characters that exist in real life. She omits Perrault's fairy godmother who has power to change animals and objects into something else, and instead creates a new character, an old lady. In the story, the old lady is Zahra's long-lost grandmother. Rather than using magic, which Islam does not encourage, the grandmother helps Zahra by bringing in some helpers and attendants. Every time she claps her hands, the helpers will do Zahra's house chores[64]. There are also three ladies who bring a green dress, a headscarf and a pair of glass slippers to style Zahra.

Furthermore, the setting of the party that Zahra attends is also different from the one Perrault depicts. The invitation to attend a festival from the king is replaced with a party to celebrate Eid al-Adha at the palace. There is no dance session; women and men sit in separate halls. Unlike Perrault's Cinderella who spends her time dancing with the prince, Zahra stays in the women's hall, socialising with the queen and other women. Cinderella and Zahra wear different kinds of outfit. The former wears a dress made of gold and silver, whereas the latter does an outfit that is in accordance with the Islamic dress code for women. In the story, she wears a green *abaya* that covers her *aurah* and a headscarf to cover her hair. Through her protagonist, Gilani-Williams instils in her readers' mind the correct way for Muslim women to dress.

Gilani-Williams includes Qur'anic verses and hadiths as reminders for readers. For example, she cites Qur'anic verses such as 49:13, 2:286, 11:11, 55:60, and 41:34-35 and includes two hadiths in her book. Additionally, the writer uses Islamic expressions such as *Inna lillahi wa inna ilayhi raji'un* (from God we come and to Him do we return), *La ilaha ill-Allah Muhammadur rasulullah* (there is no god, but God and Muhammad is the Messenger of God), *As-salamu alaykum* (peace be with you), *Wa alaykum as-salam* (and on you be peace), *Mashallah* (God has willed it), *Jazaki Allahu khayran* (may God

61 *Ibid.*, p. 9.
62 *Ibid.*, pp. 28-29.
63 Carter, *The Fairy Tales of Charles Perrault*, cit., pp. 33-34.
64 Gilani-Williams, *Cinderella: An Islamic Tales*, cit., p. 22.

reward your goodness), *Alhamdulillah* (praise be to God), *Subhanallah* (glory be to God) and *Inshallah* (God-willing). By including these Islamic expressions in conversations between the characters, in a way Gilani-Williams helps to educate children in their correct usage in everyday life.

Conclusion

Fairy tales are indeed part of children's literature. They are used as means of entertainment as well as educational content as well as a medium to shape and mould children's characters. Before fairy tales were written to educate children, as folklorists and researchers discovered, these tales were originally intended for adults. Therefore, some elements in them were unsuitable for children. Realising that stories have the power to mould one's character, writers of the nineteenth century such as Perrault and the Brothers Grimm decided to re-appropriate folk stories by producing adaptations which they believed would be suitable for children's imagination.

As people criticised the messages conveyed in those tales, several writers decided to write their own versions instead. Writers like Angela Carter (1940-1992) and Philip Pullman (1946-) felt the need to re-alter Perrault's and the Brothers Grimm's adaptations. Likewise, Muslim writers realised the need to rewrite those fairy tales as they realised the importance of incorporating Islamic values and perspectives in them. Muslim writers replaced some offensive parts in Perrault's and the Brothers Grimm's adaptations with Islamic values and perspectives. By doing so, they use the modified texts to spread and teach Islamic tenets and teachings to Muslims as well as to non-Muslims. Gilani-Williams has done the same with Perrault's *Cinderella* and her fairy tales herald a new beginning in Muslim children's literature and have the potential to serve as moral guidance for children.

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Adelina Mamaqi: a writer for childhood in 20th century Albania

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ABSTRACT: This essay focuses on the work of Adelina Mamaqi, one of the first female authors of Albanian children's literature of the twentieth century. Firstly, the communication problems between the scriptures and the Albanian people and the subsequent resolution through Rilindja (the National Risorgimento) are analyzed. Secondly, the research deals with the characteristics of fairy tales, fables and poems for the childhood of Albanian writers in a realistic key. Finally, the writing traits of Adelina Mamaqi are highlighted, appreciated for her concrete texts. Some examples are *Bubi i vogël* (The little puppy, 1963), and *Orizi i milingonave* (The rice of the ants, 1965).

EET/TEE KEYWORDS: History of education; Childhood; Writing; Albania; XXth Century.

Introduction. A Brief History of Albanian Literature

Across the scenario of European literary cultures, Albanian literature reveals thematic affinities with the grand spiritual routes of modern culture. Its specific traits arise from the distinctpath of its history.

Addressed by many as «the people without books» and dominated, among others, by the Turks for five hundred years, Albanian smainly bore an oral tradition, not limited to fantastic and epic traits, but with a strong social temperament: suffice is to mention the Code of Dukagjini, a veritable *jus communis* of the Albanian nation, which in the oral tradition represented a sharedcanon reference[1].

Despite the lack of literary references, due to the aforementioned uncertain situation or utter absence of written traditions, oral sources portrayed the

[1] R.D. Martucci, *Il Kanun di Lek Dukagjini*, Lecce, Besa Editrice, 2008.

intertwined relations with the cultural traditions of bordering countries, such as Greece, Yugoslavia, and Serbia. As a matter of fact, most Albanian writers borrowed their alphabets from these neighboring populations, and from their literary legacy.

Although a real political unity of the country did not exsist, concrete testimony could be made through the study of the local folklore of popular songs, and family traditions[2].

For the first time, perhaps upon the onset of the *Rilindja*[3]. Patriotic leagues supported the birth of Albanian publishers, as is the case of the 1879 *Shoqëri e të shtypuri shkronja shqip* (Society for the print of the Albanian alphabet) based in Istanbul, which tried to establish a unified language to be taught in schools and used as the idiom for literature. Therefore, the publication of magazines such as represented a way to make the Albanian people's sufferings known to a wider public. Together with other publications, the newspaper «Drita» (The Light), which went to print in 1887 in Bucharest, Romania, evidenced «the right to publish books in an indigenous language»[4].

The Albanian language was also spoken in rather consistent *enclaves* such as the Italian-Albanians or *Arbëresh* who lived in Southern Italy, in Calabria after the fall of Albania under Turkish rule. Over time, these communities have shown a strong bondwith their homeland. This is widely testified by the tenacious resistance of the Albanian lineage to be assimilated by languages, such as Italian and Greek. As Domenico Comparetti wrote:

> More than anything else, what in our view qualified the Albanian people is the language they speak. This entailed its extraordinarily resilient conservation, against any grievance which, arising from stronger motives, opposed its very existence, thus preventing the Albanian people from being adrift, as was the case of many others who became entangled with the melting pot of diverse dominant populations. Albanian is yet another example of a language considered as a robust factor to preserve nationality, even when nations, in the political sense, may have lost their unity and independence[5].

After a long period of political upheaval and ethnic disruption, nowadays Albania is a constitutional state State, and this destiny very much relies upon the

[2] M. Mandalà, G. Petrotta (edd.), *Studi di storia della letteratura albanese. Svolgimento storico della cultura e della letteratura albanese. Studies in History of Albanian Literature. The Historic Unwinding of Albanian Culture and Literature*, Palermo, A.C. Mirror, 2003, p. 12.

[3] The Rilindja Kombëtare Skjipëtare (Rinascita Nazionale Albanese) a kind of communication channel was created between Albanian writings and Albanian readers. See D. Shehri, *Come leggere la letteratura albanese* (How to Read Albanian Literature), Rome, Aracne, 2013, p. 9.

[4] M. Geraci, *Prometeo in Albania. Passaggi letterari e politici di un paese balcanico* (Prometheus in Albania. Literary and Political Passages in a Balkan Country), Soveria Mannelli, Rubbettino, 2014, p. 62.

[5] D. Comparetti, *Saggio di grammatologia comparata sulla lingua albanese* (A Comparative Grammatology Essay on the Albanian Language), «Revue critique d'historie et littérature», April 21, 1866, pp. 249-252.

way Albanians managed to preserve their native language. It was a lingering, silent, but extremely resilient struggle in which the *Arbëreshe* writers played an essential role during the 19th century.

It appeared as a particularly remarkable phenomenon also for foreign scholars, for instance for the French glottologist Antoine Meillet[6], who does not associate the preservation of the Albanian language with the actual Albanian State. This view was also shared by others, such as the Italian ethnography scholar Antonio Baldacci[7], who defines the Albanian language «which some claim to be a poor and simple idiom […] on the contrary, it is a language with vigorous expressions and far from lacking culture»[8].

The debate is widespread, and has been developed through compelling contributions curated by Italian-Albanians, namely Girolamo De Rada[9] and Demetrio Camarda[10]. They began to be concerned with the matter over the course of 19th century, as they were scholars who had the merit of harmonizing the Albanian linguistic and literary production.

De Rada became immediately renowned for "The Albanian of Italy", published in Naples, 1848, in addition to the many poems, songs, philological and grammatical works. Basically, in Girolamo De Rada it is possible to meet an all-European and Italian romantic sensitivity, through which he placed himself into the Albanian oral tradition of their National *Risorgimento*[11]. Demetrio Camarda[12] wrote a *Sprovë e gramatologjisë krahasuese mbi gjuhën shqipe* (Essay on the Albanian Language, 1864), along with many other works such as poems, songs and literary pieces, written on Albanology topics[13].

In addition, Camarda is credited with having contributed to the unification of the Albanian alphabet, along with other Albanian and Italian-Albanian scholars. This process reached its peak during the Congress of Manastir (1908), aptly called the *Congress of the Alphabet*[14], when the current Albanian writing

6 A. Melliet (Moulins 1866-Châteaumeillant 1936) was a French linguist, and a scholar of Greek and Slavic languages. He was the chief exponent of the French Indo-European linguistic school since the start of the 20th century.

7 Antonio Baldacci (Bologna 1867-1950) was an Italian botanist and geographer. A scholar in the ethnographic, political and socio-economical fields, in 1913 he published *Scutari d'Albania* on the «Italia» magazine.

8 Mandalà, Petrotta, *Studi di storia della letteratura albanese. Svolgimento storico della cultura e della letteratura albanese*, cit., pp. 13-14.

9 Girolamo De Rada (1814-1903) in Macchia Albanese (Cosenza).

10 Demetrio Camarda wrote a collection of poems in honor of Dora d'Istria, a Romenian writer and aristocrat of Albanian origins, and an attentive connoisseur of Albanian traditions and their people's rights.

11 See Mandalà, Perotta (edd.), *Studi di storia della letteratura albanese. Svolgimento storico della cultura e della letteratura albanese*, cit., pp. 30-31.

12 Demetrio Camarda (1821-1882), in Piana degli Albanesi (Palermo).

13 *Essay on the Albanian Language* (1864). Demetrio Camarda is renowned for his collection of poems in honor of Dora d'Istria.

14 Mandalà, Perotta (edd.), *Studi di storia della letteratura albanese. Svolgimento storico della cultura e della letteratura albanese*, cit., p. 36.

system was approved, and through which the Albanian people attained their own alphabet. Writing was finally rendered factual feat, and for the first time the Albanian literature took the stage after being «always isolated, since it was epitomized by non-communication […] as in a cluster of cultural islands with no communications among them». Thus, writer began to establish communications across the 1920s and the 1930s[15].

Next to the country's independence, the new fangled 20th century Albanian literature had to change its literary diffusion once again after the Second World War (1945). Albanian writers focused on realism, recounting the tragic events and griefs suffered by their people during the Fascist occupation and the communist totalitarianism of Henver Hoxha. There emerged a measured but steady desire to tell stories: pamphlets and hot satires on reactionary politicians were shaped as *feuilleton* publications[16] and fictional writings grew slowly. These concerns also included issues related to youth education, with the onset of an Albanian literature for children and young people, addressing the key events faced by the Albanian youth.

As regards children's literature, some storytellers wrote fairy tales, fables and poems for kids, albeit in a realistic key. In the second half of the 20thcentury, the works of Virgjil Muçi offered a broad view on the myths and legends of the Albanian people, a world inhabited by supernatural beings and humble but potent characters, full of symbolisms and allegories[17]. During the same period, Adelina Mamaqi also voiced childhood stories and poems for kids, putting animals at the center of the scene, such as the sparrow *Pupi mik* and the white butterfly *Flutura e bardhe*, the protagonists of simple and real stories in which she highlights her voice poetic is here directed to good feelings, imagination and imagery, so as to attain a vibrant awakening of children's curiosity[18].

1. *The Realist Narrator*

Narrators can act as witnesses of facts, or manifest themselves as scrupulous spectators of unreal situations to be told, hence becoming voiceswho fills white pages with the truth. From the stand point of realist philosophy, Aristotle and Plato attributed an educational value to the realist narrator, conveying

[15] D. Rossi, *Letteratura albanese. Realismo socialista 1945-199*0, Milan, P. Greco, 2016, p. 14.

[16] The Fuilletonis also known as "serial novel", it developed as a genre in the first decades of the 19th century in France and England.

[17] Virgil Muçi Tirana 1956. This children's author wrote several works, among which: V. Muçi, *Fiabe albanesi* (Albanian Fables), Nardò (Lecce), Besa, 2019.

[18] Please see: N. Jorgaqi, *Antologia della letteratura albanese* (An Anthology of Albanian Literature), Cosenza, Luigi Pellegrini Editore, 2007.

a simplified cultural dimension where the confines of lived and imagined reality, between history and myth, are persistently reconsidered[19]. From the 19th century to the present day, the scientific evolution of literary production's critical analysis cast an aura of mystery to the term realism. Jean Paul Sartre's reality is not the same of Thomas Mann's, nor that of James Joyce's Ulysses, because they employ different methods of expression. Hence, one can infer that any genre of realistic narrative reflects the author's *Weltanschauung*[20]. It is a valuable way to discover an author's vision of the world, a reality, not just an imaginable situation. Therefore, realism and pedagogism meet in a concrete fashion through certain contents, highlighting history trends and my thologizing positive characters, even when they are, so to speak, "distorted or overturned" by authors belonging to the different genres of contemporary realism.

During the 20th century, the narrative choices geared towards realism established a canon of writing according to certain moral values, even if for style reasons, particularly because these proposals had and still have young people in mindas readers. Across the ages, children's literature of any kind – popular, sentimental, and fantasy fiction – had to face debates due to the contrast between reality and imagination.

This awakening of argumentative attention was deemed by many as a sort of emphasis of the essentially moralizing value of realistic literature. In this regard, Anna Maria Bernardinis points out how a certain realism was pushed towards children's literature.

Diverse facets of everyday life, even those defined as «most perverse, become the subject of literature»[21]. One can here refer to a host of fairy tales: for instance Bluebeard, despite having been published centuries ago, is still dense with disconcerting realism, considering the topics related to violence against women[22].

Often, "reality" is synonymous with truth, so one can refer to narratives that simply implement the power of feelings, making a halt at the mere description of facts, without delving into explanations[23]. In realistic juvenile literature, the author intervenes with an educational drive, since in the writer's opinion the impact with reality must have its educational value and a moral purpose, especially when these purposes are aimed at young people.

[19] A.M. Bernardinis, *Realismo e pedagogismo nella letteratura giovanile* (Realism and Pedagogism in Children's Literature), «Specchio del libro per ragazzi», n. 99, October – November 1980, p. 3.

[20] The concept of the world and the very life of an individual.

[21] Bernardinis, *Realismo e pedagogismo nella letteratura giovanile*, cit., pp. 5-6.

[22] Please see: C. Carrer, *Barba-Blu, Fiabe e storie (album)* (Blue-Beard, Fairy Tales and Stories), Rome, Donzelli, 2007; A. Articoni, *La sua barba non è così blu… immaginari collettivi e violenza misogina nella fiaba di Perrault*, Rome, Aracne, 2015.

[23] Bernardinis, *Realismo e pedagogismo nella letteratura giovanile*, cit., p. 5.

The critical debate on socialist realism is extremely wide-ranging, and this is the case of 20th century Albania, a time when the state-driven cultural plans showed a definite ideological firmness and uniformity. Starting in 1945, a new literature was shaped, in order to meet the new ideological needs of the Albanian society[24]. In this new phase of its historical development, the Albanian literary production became an effective tool for building a new social order, educating workers through moral teaching.

In several occasions, Hoxha intervened with public appearances to steer the work of intellectuals, although some limitations were later introduced, as the seizure of private libraries and the establishment of a Soviet Stalinist kind of National Library[25].

Alongside this framework of principles, and with the mandate to lead the literary and artistic production, Hoxha outlined the intellectual's profile, with particular attention to the inner facet of the creative process. The role of the artist and that of the writer were wholly voided of critical capacity and embedded into a predefined scheme.

The new repertoire highlighted the new national character, namely that of themes on which the artists had to concentrate: the partisan war, the role of peasants and workers' masses, family and laboraimed at the birth and education of the "new man", rejecting any "cosmopolitan" and "progressive" influence. In this context, Adelina Mamaqi grows as a children's writer, recounting her stories through all her sentiment, shaping her texts in an educational, realistic and instructive fashion[26].

Nowadays, the educational value of fantastic literature is unanimously acknowledged, and one may look at realism in literature in a baffled fashion, particularly in the case of juvenile literature. In the case of Albania, I inevitably have to dwell on this category of writing. These are not necessarily disconsolate proposals, but rather "realistic" ones, perhaps melancholic, but for those who had a chance to know the Balkans like I had, it signifies that this kind of sentiment is quite common, as one must refer to everyday life in a concrete manner.

In this regard, Adelina Mamaqi was especially virtuous, because writing for children means first of all possessing an uncommon talent. The messages that each author transmits in writing are similar to the windows of the soul, useful to guide the true happiness of children towards their future[27]. Her prose, focused on realism, succeeded in communicating real emotions.

[24] Rossi, *Letteratura albanese. Realismo socialista 1945-1990*, cit., pp. 9-11.
[25] Perotta, *Studi di storia della letteratura albanese*, cit., pp. 34-35.
[26] *Ibid*.
[27] Jorgaqi, *Antologia della letteratura albanese*, cit., 2007.

2. *Realism in Adelina Mamaqi's Literature for Children*

The style of an author is defined on the basis of the use of less adjectives and more verbs, more dialogues and few indirect speeches, attacks are important, as are the contents. Furthermore, the historical layout, the graphic aspect is also important, for this purpose the French are said to have raised the fate of children's literature by using the graphic aspect a lot and cultivating talented illustrators[28]. At this point I wonder if the same situation could have occurred in the Balkan territories, precisely in Albania where the image was certainly important, but it was necessary to select a certain type of image in order not to generate problems and suspicions.

In general, authors who write for children and for children must absolutely deal with the reader's understanding skills, therefore with the language to be used to convey ideas, events and emotions in the right way. Just the words, their hidden meaning were considered dangerous during the communist regime in Albania.

Words used with the right size, considering them, simplifying them, I would almost trivialize them in order not to seem dangerous. For these reasons, at that time all intellectuals were looked upon with suspicion, they did not have the opportunity to be able to express their thoughts, because the only thought to follow was that coming from those who dictated the law. The basic idea to follow was an idea that was the same for everyone, no distortion, or disobedience.

This climate of restrictions began to change after the Nineties with the advent of democracy, leaving a glimpse of light for artists, intellectuals and writers such as Adelina Mamaqi, one of the best known, if not the best known, Albanian writer[29].

Adelina was born in Tirana in 1939 from a patriotic family of intellectuals, she immediately breathed a different climate, more open and inclined to change, therefore to be feared during the communist regime. Graduated from the University of Tirana, in Albanian literature and language she immediately began writing, in 1950 she made her debut with the novel *Endrra Vashërie* (Girlhood Dream) reserved for an adult audience, the story of a teenage girl's dreams, but the novel did not have the success deserved by a writer of the Mamaqi mold, because it did not respect the canons of the literature of socialist realism. It only happened in Kosovo, a country not affected by the dictatorship at the time, in Albania talking about "dreams" was not allowed, we had to remain anchored to reality, a reality that required very different attitudes from the fantasy world.

[28] A. Nobile, *Questioni di letteratura giovanile*, Rome, Anicia, 2019, p. 58.

[29] In this regard, consult: J. Nascho, *Antologia della Letteratura albanese*, Cosenza, Pellegrini, 2007.

So, in the early Sixties she began her relationship with the world of writing for children working for some magazines as an editor, «Nëntori» (November), «Fatosi» (Fatos) dedicated to children between seven and ten years, later for the magazine «Pioneers» reserved for children between ten and fourteen years of age. Until in 1963 he published his first book for children with the title *Bubi i vogël* (The little Puppy), followed by many others[30].

It can be said that in those years thanks to this first publication for children, the way of looking at things, characters and situations changed, as did its audience of readers. The peculiarity of her works is the narration of children's daily events, as well as those of animals and nature in general.

She was highly treasured in the Albanian cultural environment: Astrit Bishqemi, a scholar of juvenile literature in Albania, but also a teacher, defines her as a poet possessing extraordinary literary talents, and very creative. After all, acrossthe ups and downs due to the political situation in her country, Adelina Mamaqi has always been a presence in the world of children by writing in an autonomous manner. She pursueda realistic narrative, within which pedagogical qualities are precisely documented by the choice of contents, and also by astoryline structure that isstimulating and efficaciousfor the reader. This leads to a solidity of visions, which in the case of Adelina Mamaqi coincides with a reality that is lived, observed, which is true or plausible.

An instance is given bythe following poem, *Fluturo, kërce e rend* (Fly, jump in line)[31] which progresses as if it were a staged performance:

A e dini ç'ngjau një ditë?
Lamë pyllin dhe shtëpitë,
fluturo, kërce e rend,
te ky libër zumë vend!
Në çdo faqe, në çdo fletë,
emrin do ta themi vetë![32]

The verses of this poem were written with children's dreams in mind, and their attachment to animals. For this reason, her books have been appreciated by many as an invaluable resource for juvenile literature in Albania.

Throughout Europe, diverse authors valuedher educational stance, such as the French literary critic and Italianist Dominique Fernandez[33], who wrote

30 Adelina Mamaqi was born in Tirana in 1939. Her family was known as having patriotic and literary traditions, and since the end of the 1950s she emerged as a prominent writer of Albanian children's literature. She holds a Degree in Albanian Literature and Language at the University of Tirana, and worked for the *N. Frasheri* publishing house in its children's branch. She also was the publisher of the «Novembre» journal.

31 A. Mamaqi, *Fluturo, kërce e rend*, Tiranë, s.e., 1998, p. 1.

32 «Do you know what happened one day? We left the forest and our homes, we flew and jumped in the line, we dwelled in this book! On every page and every sheet we shall say our name, alone!».

33 D. Fernandez, *French literary critic and a scholar of Italian literature*, 1929.

about her as one of those «writers who change the world». The topic is the world of childhood, alongside which adults travel, and their problems travel with them.

Adelina demonstrated to be aware of all the ambiguities dwelling in the childhood world, using a fresh and direct language that is very popular and convincing among the young audience. Her messages conveyed the issues of her time and contain pedagogical, didactic and ethical values[34] that also distinguished her writings during the following periods of her life. After the onset of the 3rd millennium, she kept on communicating messages, methods, didactic models and also scientific knowledge, thus facing the advent of a new historical-social reality: that of democracy.

Her interesting life as a writer was divided into three periods, including a pause for reflection.

The first phase from 1963 to 1990, defined as a moment of socialist realism, opens with the publication of the book entitled *Bubi i vogël* (Little Bubi), ends with a monograph entitled Shipirti plot me rubine (The soul full of rubies), and the study on the writing of Adelina Mamaqi *Kopshti i bukur* (The beautiful garden)[35], on her poems and tales.

The object of her attention are themes suitable for child psychology, full of creativity and humor, at this point Adelina's books become the subject of study by a series of writers among whom we mention Qdhise Grillo, Bedri De Dja, Xhahid Bushati[36], which appreciate her creative originality. Between the 1920s and 1930s, she was called «the greatest and most talented author of fairy tales of all time», because she identified the difficulty of writing for a young audience, of looking at the world with the charm of childhood.

In this regard Angelo Nobile writes that in order to be in tune with a youth audience it is necessary to have very clear requirements, a vocation gained mostly through the reading of the classics of children's literature, reading Andersen, Lindgren, London and so on[37]. It is important the creative vein that Adelina possesses in massive talents, the knowledge of literature for the young age to which she gives a pedagogical value.

During the second period (1990-2000) the writer pauses writing during which she observes what is happening around her, reflects and prepares for a very prolific new season of children's books. The period is very particular, the communist regime of Enver Hoxa has fallen, new problems emerge such as immigration, overcoming poverty, the start of the democratic regime.

34 Rossi, *Letteratura albanese. Realismo socialista 1945-1990*, cit., p. 35.

35 Shukrie Rama, *Kopshti i bukur*, Prishtina, Casa editrice Rozafa, 2007.

36 Odhise Grillo (Vuno, 21 marzo 1932 – Tiranë, 24 settembre 2003) was a well known writer in Albania. He has mainly dealt with children's literature. Bedri Dedja another writer for children (born in Korça on 20 November 1930-13 April 2004), studied the psychology and pedagogy of children's literature in Moscow.

37 A. Nobile, *Questioni di Letteratura giovanile*, Rome, Anicia, 2019, p. 66.

The important element of these long ten years is nostalgia, observes the indifference of the Albanian state towards artists and intellectuals and her way of reacting is melancholic. In her silence, she collects ideas to start writing again in 2000 with a different spirit, she elaborates different books, the fruit of her observation. This third period is very rich especially with new writings. The author tries to communicate a certain knowledge to the children, sends didactic messages together with a genuine creativity that is clearly evident in her works[38]. These works have in common the reference to everyday life and events related to children, animals. She manages to transmit, using a carefully chosen vocabulary, a further knowledge of the world of children.

At this point, critics no longer write about her, perhaps because of the entry of other theories of education, because of the numerous changes that materialize throughout Albania.

3. *What to Comunicate to the Young Reader*

The history of literature and literary criticism defines the currents of realism as responses to excessive formalism, underlining the inclination to manifest reality in an artistic fashion[39]. Therefore, Verga or Machiavelli may represent realistic literature in Italian, despite beingrat her divergent from each other because of their style, the content and the purpose of their works. The history of children's literature envisages some priorities: the young reader.

Adelina strived to transmit a pretty variegated kind of learning to the young reader, rich with messages and examples, delivering a fertile teaching course as she also communicated real knowledge.

Upon analyzing some of herrecent works, as *Sa shtëpi ka dielli?* (how many homes does the sun have?) the common denominator is always the narration of everyday life, both for children and animals[40].

For instance, in her book *Joy-Toi*, the child is portrayed with vital realism, the story is imbued with his playful daily life, and his voice is audible through everyday images, just like in the world of every child.

The author succeeds in outlining her character by following the child's relationships, both with his parents and with the games he plays. Therefore, this work highlights her thorough research towards the educational aspect other works. Point in fact, if Joey has a more controlled relationship with his parents,

[38] Some of his works: *Lodra Alfabeti, Ora Shiba, Joey Toi, Sa shtëpi ka dielli?*; *Fluturojnë kërcejnë dhe vrapojnë*; *Ariu dhe dy karriget*; *Bardhoshi Xhepkoshi; Vallja e bletëve; Zogu Pup*.

[39] K. Bihiku, *Storia della letteratura albanese* (History of Albanian Literature), Tiranë, Nëntori, 1981.

[40] A. Mamaqi, *Sa shtëpi ka dielli?*, Tiranë, Botuar në, 2008.

his attitude is different with regard to playing, when he feels more spontaneous and free. What did she communicate to the young reader? Adelina tried to describe the life of a child in the simplest possible fashion, where the intimate, the social aspect and family relationships are combined, later differentiating their course through the child's communication models[41].

With the collection of short stories *Zogu pup* it best expresses this natural relationship of children with nature. This is not the author's most interesting work, but I decided to talk about it because in 1981 she won the first prize in the national competition for children's literature, therefore in full communist rule.

Why does he win the award? Perhaps because he manages to tell simple stories, at the same time using literary figures as comparisons and metaphors alluding to the conditions in which the population lived during the communist regime.

a. *Zogu pup*

Adelina Mamaqi's publication entitled *Zogu pup* (the bird Pup), cannot be said to be among the most interesting of the Albanian writer, but surely it is the one that through simple, but very direct language, managed to hit the reader leaving a sense of freshness mixed with an inevitable melancholy. In fact, the particularity of the publication in question lies precisely in the fact that it can be read in various ways, simply by following the adventures of the feathered *Zogu Pup*, or by making frequent analogies with the communist period.

The story, divided into several chapters, is written in a simple but clear way and begins with the description of the autumn season; the protagonists are animals and vegetables, elements that certainly appear genuine and suitable for a child's audience, but surely not trivial. The dialogue between a bird and a vegetable is obviously not true, but describes the political situation in Albania in a different way. The symbols are important: the greenhouse that she calls a glass house where you cannot see, but you can be seen. The greenhouse represents Albania, a country at that time closed, without contact with the outside and absolutely autonomous.

Adelina Mamaqi's skill lies in being able to camouflage this thought. The fantastic dialogue between Zogu Pup and the vegetables is absolutely unreal, but full of symbolic elements, the flight represents freedom, exactly what the Albanian people had lost at that moment. Therefore, the greenhouse represents Albania closed to contacts with other countries, the need to produce all that was needed to live independently.

[41] Bihiku, *Storia della letteratura albanese*, cit., 1981.

Mirëmëngjes! – i tha Pupi. Bima e vështroni njëcopëherë. Dukej qënuk kishte parë qënie të tillë:
Çfarëje ti? – e pyeti[42].

«To ask too many questions the other person is annoyed», another element of connection with the period of communist realism and Pupi is very curious, he always and continuously asks questions, also with his wings he can fly, look from above, depicts the independence and autonomy.

Just this gift of his: the wings will allow him to save himself from being closed, from being imprisoned in the greenhouse. This is an additional interesting point in the story.

Pupi in fact remains closed in the greenhouse of vegetables and at that moment the irrigation of vegetables begins, «drops of water that may seem like tears like the human cry of those who suffer from the loss of independence», but the water also serves to nourish plants, make them grow well.

Pupi also cries, because he cannot go back to its nest, to its family and the little plants console him by saying:

Unëu mërzita, se mbeta këtu brenda. Si do tëdal tani? Nëna dhe vëllai im Fluri do tëpikëllohen shumë. Nuk do të lënë vend pa më kërkuar. Mbase do të mendojnë se më ka rrëmbyer Skifteri. Ja prandaj qaj, se nuk i mbaj dot lotët.
Duke thënë këto fjalë, Pupi ia dha përsëri të qarit…
Mos qaj, Pup, i dashur, - e qetësoi bima, e cila e kuptoi ç'ishin lotët, - dritaret do tëhapen përsëri dhe ti do tëshkosh te nëna e te vëllai Flur.
Kur do tëhapen? – nxitoi tëpyeste Pupi.
Nesër në mëngjes.
Në mëngjes?! – U tmerrua ai.
Gjer atëherë nëna ime do të plasënga hidhërimi[43].

The possibility of being able to get out of that greenhouse, however, exists and materializes when the workers finished their shift, they go away, a window opens and Pupi takes advantage of it, flies away towards freedom, returns to its family. This is also the escape of a coward, as defined by the workers.

Even in these verses of the story there is a link with the oppression of the communist regime where there was a fear of speaking, but there is also a call to

[42] «Good morning! Pupi said. Look at the plant from time to time. He did not seem to have seen such a being: - What are you? – churches». A. Mamaqi, *Zogu Pup ne Shtepine Prej Xhami: novele*, Tiranë, s.e., 1982, p. 5.

[43] «I was angry that I stayed inside. How will you get out now? My mother and my brother Fluri will be very sad. They won't leave the place without asking me. They'll probably think Falcon kidnapped me. That's why I cry, because I can't hold back the tears. Saying these words, Pupi made him cry again 'Don't cry, Pup, darling', she calmed the plant, realizing what the tears were, «the windows will reopen and you will go to your mother and your brother Flur». – When will they open? – Pupi hurried to ask – In the morning. – In the morning?! – He was terrified. Until then my mother would have been in pain». Mamaqi, *Zogu Pup ne Shtepine Prej Xhami: novele*, cit., p. 7.

the need to always tell the truth, even when Pupi knows that by telling it to its mother it will be reprimanded for its escape from the nest. Although its brother will encourage Pupi not to tell that truth so as not to incur punishment, but Zogu pup will do so by telling its brother that «mom is free to scold me, but I'm not free to tell lies»[44].

A further symbol present in the story is the ray of sunshine that can be interpreted in various ways: the sun is high and from above illuminates, dominates the earth, warms it, favors the ripening of fruits, vegetables. However, the vegetables closed in the greenhouse are unable to rejoice in these rays, so the sun in this case does not do its job as it should, does not arrive in the closed place. The closure is comparable to the interruption of communications during the Hoxa regime, together with the resignation that this closure generates in the inhabitants, as «the cucumber that is in the greenhouse is convinced that it is comfortable in that place»[45].

This story written by Mamaqi mainly for children, expresses simple and linear concepts, refers to communism, to the damage it has created, the greenhouse is seen as a symbol of closure, separation from the real world.

The vegetables closed in the greenhouse do not know the wind, they cannot take advantage of the benefits of the sun and rain, they are cared for, irrigated and preserved thanks to a glass that protects them from the elements, but also makes them live differently.

When a new disturbance appears, characterized by the storm, by dark clouds, it almost seems to refer to jealousy towards the sun, its rays that heat up. The sun's rays are welcome by everyone, because it seems that they joke with flowers, with butterflies, with children, with fruit. The cloud seems so angry when it swells and releases its anger with heavy rain, with thunder and lightning.

This wrath unloads her especially in autumn and winter. Then he begins to hail, ruining the glass greenhouse and bringing the cold to the inhabitants trees. So Pup flies to ask men for help. Until it hears their voices, because Pup had learned the language of men. The boilers arrive and turn on to heat the greenhouse.

On the other hand, the benefit of the sun is described, also seen as the sun is hope, light and then the clouds that express negativity. The cloud is envious. He does not want the sun's rays to see beautiful things like butterflies, animals.

At this point in the story, Adelina Mamaqi refers to other impulses, that of communication. Pupi is everyone's friend, speaks as if he were human, sings,

[44] *Ibid*., p. 10.

[45] In this regard, consult: A. Cuka, *Considerazioni sul realismo socialista in Albania, fra rigide direttive ufficiali e aperture culturali*, «Ricerche di S/Confine. Oggetti e pratiche artistico culturali», vol. IV, n. 1, 2013.

is cheerful, sees shops, people, sees a situation that does not correspond to the economic and political situation of Albania in those years.

At this point of the story Adelina falls within the logic of socialist realism making references regarding the goodness and obedience that represented the ideology of the time giving that image of ethnicity and nationality filtred trough communist ideology, resonated within the mind of the reader and work to develop cultural stereotypes and identities[46]. As Leerssen also pointed out, good literature often works on the assumption of suspected disbelief and some appreciation from the public. The images of nationalism used in children's books promote the national communist consciousness, as well as the virtues of communist emancipation, citizenship and economics[47].

So, we talk about the weather and some manifestations such as hail, rain, fog apparently simple, but with a singular potential, the realist socialist literary metaphors with respect to nationalism and ethnicity provide a background for the writers of children in Albania. The reasons for communist realism in these texts helps to transform children into ideally communist citizens with a strong concept of family, honesty, control.

So when in the story Pupi appropriates a tomato without asking for it "steals it", Mira forgives him for the gesture because he has the courage to self denounce it, therefore he is rewarded and invited to live in the greenhouse together with his family. This educational part, this invitation to live in a protected place, suggests the control of the regime.

Janë mbushur dyqanet plot me domate e kastraveca, mu në mes të dimrit, sikur të jetë mesi i korrikut. Tani miku im, do tëpresim ca këtu në magazinë, sa tëna shkarkojnë, dhe pastaj do t'ia mbathim në serën e domateve[48].

These are certainly educational dialogues, aimed at the growth of children, therefore the difference between vegetables, plants, animals in general can be seen as a treatment of the various problems existing in a society.

According to the writer, cucumbers resemble people, the cucumber plant is full of parasites, the parasites of society, but cucumbers dress the shirt, It is a sort of retina placed on them and then put on sale.

46 E. O'Sullivan, *Imagogy meets children'a literature*, «International Research Children's Literature», 4 July 2011, pp. 1-14; J. Leerssen, *Imagology: History and Method. Imagology: The Cultural Construction and Literaty Representation of National Characters: A Critical Survey*, Amstredam, Ed. Manfred Beller and Joep Leersen, Rodopi, 2007, pp. 17-32.

47 *Ibid*.

48 «The shops are full of tomatoes and cucumbers, right in the middle of winter, like it's mid-July. – Now my friend, we will wait here in the warehouse until they unload us, and then we will run to the tomato greenhouse». See Mamaqi, *Zogu Pup ne Shtepine Prej Xhami: novele*, cit., p. 26.

Jam penduar, jam penduar dhe më ka qortuar nëna, - u ngut ta sqaronte Pup, i cili e kuptonte gjuhën e njerëzve. Po Mira nuk i kupyonte cicërimat e tij. Ajo, duke vazhduar tëbuzëqeshte, këputi nga kati i parënjëbisk me domate tëvogla sa njëkokërr qershi dhe ia zgjati nënës Ciuci[49].

In the final part of the book, autumn is greeted with a "goodbye" to next year, ending up attributing to the simple role of the cucumber a sort of peculiar task for a young society like the Albanian one, in constant change and evolution.

Conclusion

Alongside a very rigid framework of principles regarding literary production, during the period of Hoxha's dictatorship, an intellectual profile was outlined, with particular attention to the psychological aspect of his creative process. For this purpose, in order to avoid the danger of the immobilization of a class of scholars in a privileged niche, it was decided to invite them to participate in the production processes, thus considering manual labor as a necessary solution to create that solid link between the commitment of the intellectual and the condition of the masses[50].

The role of the artist and that of the writer came in this way completely emptied of individual critical capacity and inserted within a predefined scheme, which placed them in an exchange with their public, of which they were students and teachers together. On the other hand, however, it is necessary to note that this formalization of the role of the artist represented for the first time an identification of intellectual work as a real "job", comparable to the others in terms of public utility.

Adelina Mamaqi was part of that group of intellectuals, mostly women, who was sentenced to partial silence during the regime. A note from the field of childhood literature, she also distinguished herself as a novelist and poet for children[51].

She fully lives the period of the communist bloc, aware that the ideal communist models were tied to extreme patriotism and taught to value and protect Albanian goods and material resources. At the same time the poet-writer loves literature for children.

[49] «I repented, I repented and my mother scolded me, hurried Pup, who understood the language of the people. Yes, Mira did not understand his tweets. She, still smiling, tore a biscuit with cherry tomatoes from the first floor and he handed to mother Ciuci». *Ibid*., p. 35.

[50] E. Shockett Qafleshi, *Images of. Ethnicity, Nationality, and Class Struggle in Communist albanian children's literature and media*, 4 October 2013, <https://doi.org/10.1353/bkb.2014.0002> (last access: 29.07.2020), pp. 21-22.

[51] In this regard, consult: Jorgaqi, *Antologia della Letteratura albanese*, cit.

Still to this day, Adelina Mamaqi endures as an icon of Albanian literature for children and young readers. She erected her figure as an artist in the field of Albanian writing canons. She is the only model of an artist who proved to possess a real talent in writing for children, also by means of an authentic consistency with her lifestyle.

For about fifty years, she let herself be inspired by real life, harnessing robust poetic and educational abilities. Writing for children is certainly not an easy feat, one must master an indisputable talent and also a decisive sensitivity towards their world. Mamaqi managed to accomplish hall of the above, also placing the importance of juvenile literature not as a second-rategenre, but rather an integral part of a nation's literature[52].

When asked in an interview «what does it mean to write for children?», she replies that writing for children means first and foremost to have a prominent talent. Children's literature is an integral part of a nation's literature and the writers who deliver it, marks differentiation, are the writers of that nation»[53].

[52] Rossi, *Letteratura albanese. Realismo socialista 1945-1990*, cit., p. 30.

[53] A. Mamaqi, *La scrittrice che illumina la letteratura per bambini e giovani*, 4 february 2018, Last updated: july 29, 2020, <https://Shqiptarja.com> (last access: 29.07.2020).

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