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*Essays and
Researches*



Saggi e
Ricerche

Educational policies and colonization: schooling in Eritrea under Italian rule (1890-1941)

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ABSTRACT: In the context of Italian colonization in Eritrea, education was strategically used as a central mechanism of the colonial regime's political agenda. This paper aims to present the major historiographical perspectives on the development of Italian schools from 1890 until the onset of British occupation in 1941. The establishment and growth of these schools reveal a complex interweaving of economic, social, and political dynamics, which not only reinforced the colonial presence but also intensified tensions between the Italian settlers and the Eritrean population. Analysis of archival documents indicates that educational policies acted as both an instrument of control and a space of ambivalent possibilities, providing a contested ground between enforced assimilation and local identity claims.

EET/TEE KEYWORDS: Italian schools in Eritrea; Italian immigration; Indigenous education; Italianization; Eritrea; XX Century.

In the context of Italian colonization in Eritrea, education played a central role, closely aligned with colonial policy. Rodolfo Micacchi, who served as the Inspector General for Schools and Archaeology at the Ministry of Italian Africa, stated in 1932: «the issue of education in the colony, whether concerning metropolitan citizens or specifically relating to the indigenous population, is essentially a political issue, whose resolution necessarily depends on the general directives of colonial policy»¹.

This perspective reflected an approach that subordinated educational or-

¹ R. Micacchi, *L'istruzione elementare nelle Colonie italiane durante il primo decennio del Governo Fascista*, «Annali della istruzione elementare», vol. 7, n. 4-5, 1932, p. 104 (my translation).

ganization to political and demographic needs. On one hand, schools for Italian immigrants were designed as tools to facilitate their settlement in the colony, addressing the need to establish a stable Italian community. On the other hand, the education of the indigenous population was planned in accordance with the colonial government's policies, which sought to balance effective administrative control with the seemingly generous provision of education².

Building on this reflection, this essay seeks to compare several theses advanced by historiography in the field of educational history in Eritrea, focusing on the origins and development of the Italian schools established in Eritrea during the period from the beginning of Italian colonization in 1890 to the British occupation in 1941.

The analysis will employ an analytical approach grounded in a partial review of archival documentation held at the Archivio Storico Diplomatico del Ministero degli Affari Esteri and the Archivio Centrale dello Stato in Italy. Although these sources have only been partially examined, they provide insights into not only the historical status of the schools but also the perspectives and approaches adopted by the Italian government in addressing educational challenges for both the Italian settlers and the local population. This analysis is positioned within the broader context of Italianization strategies, revealing how the government tailored its educational policies to address demographic and cultural objectives in the colony.

1. *The origins and initial expansion of Italian schools in Eritrea*

After 1882, when the Bay of Assab was formally acquired by the Italian government through an agreement with the Rubattino shipping company, the early years of the Italian presence in Eritrea were marked by the influx of missionaries, adventurers, soldiers, and merchants. It was only in the 1890s, after approval by the Italian Parliament in 1890, that selected farming families arrived to launch an experimental agricultural colonization project. This initiative aimed to transform Eritrea into a settlement colony while providing a partial solution to the rural overpopulation affecting Southern Italy³. However, these early attempts at agricultural colonization soon failed, and particularly following the defeat at Adwa in 1896, the government ceased the project, implementing restrictive measures that curtailed opportunities for agricultural emigration⁴. Testament to the limited success of this endeavor, by 1893, the

² *Ibid.*

³ G.L. Podestà, *Emigrazione e colonizzazione in Libia e Africa orientale*, «Altreitalie», n. 42, 2011, p. 37.

⁴ E. Ertola, *Il colonialismo degli italiani*, Roma, Carocci, 2022, pp. 52-72.

Italian civilian population in Eritrea was only 623 individuals, with women comprising just 70 of this number⁵.

In the report drafted on June 11, 1894, by Oreste Baratieri, then Governor of Eritrea, the existing educational institutions were cataloged and classified into two main categories: those managed by the government and those administered by missionaries⁶.

The first category includes boys' secular schools located in Massawa, Keren, Archico, Asmara, and Assab, along with girls' schools run by the Sisters of Charity in Massawa and the Daughters of St. Anne in Assab. Additionally, there were practical Italian language schools operating in the local troop barracks. The second category comprises the seminaries in Keren and Acrur, directed by the Lazarist Fathers of the French Mission, as well as external and internal schools managed by the Sisters of Charity in Keren, under the supervision of the Lazarist Fathers⁷. In addition to these, there are the schools in Zazega, Belesa, and Gheleb, administered by the Swedish Protestant Mission⁸, which arrived in Eritrea in 1866⁹.

Baratieri endeavored to promoting a greater dissemination of the Italian language and culture through the reform of the educational system. The Italian government, viewing the French missionaries as obstacles to this goal, accused them of insufficiently promoting the Italian language among the local population, alleging they were instead exploiting «the Catholic and Coptic

⁵ Podestà, *Emigrazione e colonizzazione in Libia e Africa orientale*, cit., p. 37.

⁶ *Report from Oreste Baratieri to the Minister of Foreign Affairs* (Asmara, June 11, 1894), in Archivio Centrale dello Stato [ACS], Ministero dell'Africa Italiana [MAI], DG Affari Civili, Ispettorato scuole [IS], b. 160. Before the intervention of the Italian government in the educational sector in Eritrea, local educational institutions already existed, such as Coptic and Quranic schools, which traditionally provided Eritrean students with an education oriented towards ecclesiastical careers. The curriculum of these schools was primarily based on the reading of sacred texts, with a training path that began with the alphabet, through which students acquired the fundamental skills of reading and writing. Additionally, there were schools established by missionaries, both Catholic and Protestant, which further enriched the educational offerings in the region (G. Puglisi, *La scuola in Eritrea ieri e oggi*, «Africa: Rivista trimestrale di studi e documentazione dell'Istituto italiano per l'Africa e l'Oriente», vol. 8, n. 3, 1953, p. 69).

⁷ The origins of schools managed by French missionaries in Eritrea can be traced back to 1839, with the efforts of Giustino de Jacobis, a missionary of the Congregation of the Mission (Lazarists) and the first bishop-founder of the Catholic Mission in Abyssinia. De Jacobis initially focused on founding schools in the Eritrean highlands that were primarily devoted to religious instruction and the training of indigenous clergy. Later, with the support of Governor Munzinger – who had previously endorsed the French Mission in the Egyptian territories of the region before 1875 – the Daughters of Charity established the first elementary school for Eritrean girls in Keren in 1878. Additionally, a vocational school was established to provide practical training in typography, bookbinding, carpentry, and metalwork, aimed at local youth with essential skills for employment (Puglisi, *La scuola in Eritrea ieri e oggi*, cit., p. 70).

⁸ *Report from Oreste Baratieri to the Minister of Foreign Affairs*, cit.

⁹ J. Miran, *Missionaries, Education & the State in the Italian Colony of Eritrea*, in H.B. Hansen, M. Twaddle (edd.), *Cristian Missionaries & the State in the Third World*, Athens, Ohio University press, 2002, p. 123.

tribes for their own material advantage»¹⁰. Consequently, in 1894, the French Lazarist Fathers were expelled from the colony and replaced by the Italian Capuchins, supported by the Daughters of St. Anne¹¹, who assumed the educational roles previously held by the Daughters of Charity. The Daughters of St. Anne established schools in Keren in 1895, in Asmara in 1898, and in Saganeiti in 1904¹². With the arrival of the Italian missionaries and their establishment of schools, the Italian government provided adequate support and rigorous oversight to ensure the educational direction of the schools under the Apostolic Prefecture aligned with the national objectives of the government's colonial mission¹³. Simultaneously, these educational institutions were valued by the missionaries as promising tools to continue their religious work among the local populations, facilitating direct and meaningful contact with them.

During the governorship of Ferdinando Martini, who served from 1897 to 1907, the European population in the colony grew significantly, reaching a total of 3,949 residents in 1905, of which 754 were under the age of fifteen, with a distribution of 409 males and 345 females¹⁴. In this process of expansion, Governor Ferdinando Martini strictly enforced the separation between Italians and the local Eritrean population, specifically by denying the latter access to European education. Martini's firm stance stemmed from his belief that an educated indigenous population could potentially threaten the stability of colonial rule. Consequently, Martini paid little attention to establishing educational opportunities for the native Eritrean population. However, he remained notably dedicated to promoting the education of Italian settlers in Eritrea¹⁵. In 1902, a government school was established in Asmara to provide elementary education to European children, both boys and girls, aged between

¹⁰ *Report from Oreste Baratieri to the Minister of Foreign Affairs*, cit. (my translation).

¹¹ The Apostolic Prefecture of Eritrea was established on September 13, 1894, following agreements between the Holy See and the Italian government. On October 1 of the same year, the newly formed Prefecture was entrusted to the Capuchins of the Province of Rome. In 1911, it was elevated to the status of Apostolic Vicariate and placed under the care of the Capuchins from the Province of Milan. See, for example, U. Chelati Dirar, *Collaborazione e conflitti: Michele da Carbonara e l'organizzazione della Prefettura Apostolica dell'Eritrea (1894-1910)*, in A. Triulzi (ed.), *La colonia: italiani in Eritrea*, Bologna, il Mulino, 2002, pp. 149-188; C. Marongiu Buonaiuti, *Politica e religioni nel colonialismo italiano (1882-1941)*, Milano, Giuffrè, 1982, pp. 58-67; M. Da Nembro, *La missione dei minori cappuccini in Eritrea (1894-1952)*, Roma, Institutum historicum Ord. Fr. Min. cap., 1953, pp. 1-94.

¹² Puglisi, *La scuola in Eritrea ieri e oggi*, cit., p. 70.

¹³ G. Ciampi, *La scuola nelle colonie*, in C. Ghezzi (ed.), *Fonti e problemi della Politica Coloniale italiana. Atti del convegno (Taormina-Messina, 23-29 ottobre 1989)*, 2 vols., Roma, Ministero per i Beni culturali e ambientali – Ufficio centrale per i beni archivistici, 1996, Vol. II, p. 678.

¹⁴ Ministero delle Colonie, *Allegati alla Relazione sulla colonia eritrea del R. commissario civile deputato Ferdinando Martini per gli esercizi 1902-907. Presentata dal ministro delle colonie, Bertolini nella seduta del 14 giugno 1913*, 2 vols., Roma, Tipografia della camera dei deputati, 1913, Vol. II, pp. 110-111.

¹⁵ M. Romandini, *Il problema scolastico nella colonia Eritrea: Gli anni 1898-1907*, «Afri-

6 to 12¹⁶. In 1904, another school opened in Keren with an initial enrollment of 25 students¹⁷, and in 1905, a new institution was founded in Adi Ugri, serving 17 Italian students of both genders¹⁸.

Due to budget limitations, Ferdinando Martini, at the first Italian colonial congress held in Asmara in 1905, proposed entrusting the education of Italian students to the Catholic Mission to ensure quality schooling. Regarding the education of the local Eritrean population, Martini emphasized that schooling should not be mandatory or standardized, although he recognized the importance of establishing schools for the children of regional leaders. These schools aimed to provide basic education, with a particular focus on teaching the Italian language¹⁹.

When Giuseppe Salvago Raggi assumed the role of governor in 1908, the new approach took shape, centered on the differing belief that it was necessary to «civilize, educate, and protect the local Eritrean population»²⁰, fostering a community of contented subjects naturally inclined to support colonial governance²¹. In 1909, with the Decreto Reale n. 800 of January 3, it was decreed that elementary education for the indigenous population would be provided on a voluntary basis, whereas it would be mandatory for Europeans in the primary centers of Eritrea²². In particular, for the education of the local population, «special programs were designed to provide them with knowledge of the basics of the Italian language and elementary arithmetic»²³. These programs were primarily focused on practical skills, aiming to prepare students

ca: *Rivista trimestrale di studi e documentazione dell'Istituto italiano per l'Africa e l'Oriente*, vol. 39, n. 3, 1984, p. 497.

¹⁶ «Bollettino Ufficiale della Colonia Eritrea», n. 46, 15 novembre 1902.

¹⁷ «Bollettino Ufficiale della Colonia Eritrea», n. 11, 12 marzo 1904.

¹⁸ Ministero delle Colonie, *Relazione sulla colonia eritrea del R. commissario civile deputato Ferdinando Martini per gli esercizi 1902-907; presentata dal ministro delle colonie, Bertolini, nella seduta del 14 giugno 1913*, 5 vols., Roma, Tipografia della Camera dei deputati, 1913, Vol. I, p. 149.

¹⁹ *Ibid.*, pp. 149-150.

²⁰ G. Salvago Raggi, *Giuseppe Salvago Raggi*, Roma, Ministero affari esteri – Servizio storico e documentazione, 1977, p. 90 (my translation).

²¹ *Ibid.*, pp. 89-91. «If the indigenous people are not to be destroyed, they must be civilized, educated, and protected, so as to turn them into contented subjects, who by necessity will have a vested interest in supporting us. Therefore, [...] it has been outlined as a guiding principle to ensure fair justice for indigenous subjects, in accordance with their traditions, while adapting its application to the needs of civilization, and to guarantee the populations the enjoyment of their lands» (*Ibid.*, p. 90) (my translation).

²² G. Mondaini, *La legislazione coloniale italiana nel suo sviluppo storico e nel suo stato attuale 1882-1940*, 2 vols., Milano, Istituto per gli studi di politica internazionale, 1941, Vol. I, p. 208.

²³ *Promemoria sulle istituzioni scolastiche dell'Eritrea* (Asmara, August 3, 1914), in Archivio storico diplomatico del Ministero degli Affari Esteri [ASMAE], Ex Ministero Africa Italiana [EMAI], Ministero Africa Italiana [MAI] III, b. 37. It is a typewritten document without the name of the editor or a signature (my translation).

for schools of Arts and Crafts and to equip the younger generations with the competencies necessary for productive participation in the colony's economy.

Based on this idea, on November 15, 1908, the government inaugurated the bilingual "Ferdinando Martini" school in Massawa²⁴, designed primarily for the children of local merchants. The curriculum at this school emphasized commercial correspondence and accounting, aiming to provide students with practical skills for trade and business²⁵. Subsequently, in 1911, with Decreto Governatoriale n. 1375 of June 5, the "Salvago Raggi" School of Arts and Crafts was established in Keren. This school primarily aimed at educating the Muslim Eritrean population, with a curriculum that included Italian and Arabic language instruction, Quranic studies, and physical education, alongside vocational training in blacksmithing, carpentry, and telegraphy²⁶. By 1914, further expansion included the founding of the "San Giorgio" Government School in Adi Ugri with Decreto Governatoriale of June 13. This school targeted the sons of the colony's Coptic leaders, aiming to prepare them for roles in district and provincial administration²⁷. The same year, the "San Michele" Government School was opened in Saganeiti and featured a free boarding facility. In addition to elementary education, this institution provided vocational training with courses in mechanics, carpentry, tailoring, saddlery, and shoemaking, welcoming indigenous students of all religious backgrounds. These schools employed both Italian teachers and local assistants²⁸, reflecting an effort to blend western educational principles with professional training adapted to the colony's unique requirements.

A report of the educational institutions operating within the country, titled *Scuole* and written in 1913, emphasizes the cooperative efforts made to advance education. In Asmara, a government elementary school was available

²⁴ Puglisi, *La scuola in Eritrea ieri e oggi*, cit., p. 112.

²⁵ The school was established with the aim of training future indigenous clerks to be employed in lower-level administrative positions, inspired by the model of English schools in Sudan, Somalia, and India. The academic year 1908-1909 began with 45 enrolled students, aged between seven and fourteen years, and the curriculum included lessons in Italian, arithmetic, geography, and Arabic. See, *La scuola bilingue governativa di Massaua*, «Rivista Coloniale», vol. 5, n. 1, 1910, pp. 221-225.

²⁶ *Istituzione di una scuola d'arti e mestieri in Cheren*, «I Diritti della Scuola», vol. 11, n. 15, 1910, pp. 110-111.

²⁷ Within a few months of the opening of the "San Giorgio" School, approximately fifty students were enrolled, both boarders and day students. The curriculum included elementary education in the Italian language, as well as instruction in Tigrinya and Amharic, religious studies, and physical and sports activities. For older students, a comprehensive military training program was also introduced, aimed at enabling them to directly join the ranks of the troops as non-commissioned officers, should they wish to do so (*Scuola S. Giorgio*, Typewritten Report from the Regional Commissariat of Serae, [Adi Ugri, August 31, 1912], in ASMAE, EMAI, Archivio Eritrea [AE], b. 145).

²⁸ *Le scuole dell'Eritrea*, in ACS, MAI, DG Affari Civili, IS, b. 152. This is a typescript lacking the name of the author, signature, and date, but it was likely written after 1939.

to both male and female students from Italian and assimilated communities, offering a comprehensive curriculum overseen by four lay instructors. Additionally, another government school, under the direction of Father Bonomi²⁹, served the local Eritrean population, concentrating on Italian language and arithmetic instruction. The Catholic Mission played a significant role, operating an elementary school for Eritrean students – open to both boys and girls – that was partially government funded. Furthermore, the Catholic Mission maintained an additional school for Eritrean students, accommodating both resident and external pupils. The Schools of Arts and Crafts for Italian students were administered by the *Società Operaia di Asmara* and the Swedish Mission, with Italian language instruction provided by an Italian teacher. Broadening the educational offerings, the Catholic Mission also established an agricultural school specifically for the Eritrean population. Additionally, Greek and Jewish institutions contributed to the educational diversity in Asmara, enriching the city's academic landscape.

In Massawa, two primary schools were operational: the government school “Ferdinando Martini” and a mixed elementary school administered by the Catholic Mission, which also received government support. In Keren, educational institutions included an elementary school run by the Catholic Mission and a school of Arts and Crafts. The “San Giorgio” school was active in Adi Ugri, while additional mixed elementary schools, funded by the government, were established in Saganeti and Adi Caieh. In areas such as Monoxeitò, Halai, and Ad Teclean, the Catholic Mission managed schools for the Eritrean population, while the Swedish Mission expanded educational opportunities in regions such as Barentù, Zarrega, Belesa, Gluleb, Tolè, Culcù, and Baresa³⁰.

The proliferation of educational institutions underscored the colony's increasing emphasis on education. Governor De Martino highlighted this priority in a circular written in 1916, framing public education as an essential component of the state administration's social responsibilities. A key objective in educating the native population was, as he expressed, «to the greatest extent possible [...] to prepare the new generations of colonial subjects, who, born under our flag, must soon learn to appreciate its benefits and admire

²⁹ Father Luigi Bonomi was born in Verona in 1841 and was ordained a priest in 1864. In 1874, he joined the Institute founded by Daniele Comboni and departed for Khartoum as a missionary, collaborating with Monsignor Comboni in Sudan. In 1887, he arrived in Eritrea as a chaplain to General Orero's troops and founded a school for local people in Massawa. Subsequently, in Asmara, he established a school for Eritreans and Italians. Through these schools, he promoted the spread of the Italian language and Christianity, dedicating himself to the mission until his death in February 1927 (G. Puglisi, *Chi è? Dell'Eritrea 1952. Dizionario biografico. Con una cronologia*, Asmara, Agenzia Regina, 1952, p. 54).

³⁰ *Scuole*, typewritten report without the author's name, handwritten date of late 1913, in ASMAE, EMAI, MAI III, b. 37.

its prestige»³¹. This aspiration, however, was believed to necessitate the intellectual and moral advancement of the native population. Only through this cultural elevation could the intended transformation occur, bridging the gap «between a subjugation aimed at civil living and the amorphous semi-barbaric social agglomeration exemplified by the indigenous person born and living outside the borders of the Colony»³².

In a 1918 report, Aldo Bibolini, then Head of the Mining Office in the Eritrean colony, emphasized the instrumental role of education in the colonial agenda, viewing it as a means to develop a labor force tailored to the colony's economic demands. Bibolini, in alignment with the policies of the time, remarked:

[Schools for the indigenous population] should instead be envisioned primarily as a means to train the labor force necessary for the needs of the Colony, both for local industries and commerce, as well as for manual labor and administrative roles in private and public offices. Additionally, they should serve to instill in the indigenous people a sufficient degree of culture to foster an appreciation and rational respect for our civilizing efforts. [...] Regardless of the specific distinctions adopted for schools of arts and crafts or trade schools, which correspond to the definition previously proposed, one thing is certain: they must share a minimum level of general education. This minimum requires the challenging task of reconciling our European perspectives with the non-brutish Abyssinian mentality and the industrialization needs of colonial domains, which must first be established and then rationally achieved. In our view, this minimum should focus exclusively on the essential cultural requirements necessary for various labor technologies, which can be tangibly summarized by the following formula: the need to learn, to read and to write sufficiently to understand and convey a simple order or an elementary work account³³.

This educational vision materialized in 1921, when the Italian government formalized regulations concerning the education of the indigenous population through Decreto Governatoriale n. 3808 of September 12. This decree outlined a structured educational system for the Eritrean population, categorized into three tiers: elementary school, school of arts and crafts, and secondary school. Each level had distinct subjects and objectives, designed to align with the practical needs of the colonial workforce. The teaching of the Italian language was mandatory across all schools, with a strong emphasis on the functional and pragmatic aspects of the curriculum.

However, the increase in the Italian population, combined with the proliferation of schools run by missionary religious congregations alongside government institutions, created an atmosphere of tension and conflict³⁴. In re-

³¹ *Pubblica Istruzione*, Circular by De Martino the Governor of Eritrea, typewritten (Keren, December 31, 1916), in ASDMAE, EMAI, AE, b. 145 (my translation).

³² *Ibid.* (my translation).

³³ *Sull'istruzione agli indigeni: proposte preliminari*, typewritten and signed by Aldo Bibolini (Asmara, July 29, 1918), in ASDMAE, EMAI, AE, b. 145 (my translation).

³⁴ A. Piccioli, *La scuola e le istituzioni educative*, in Id. (ed.), *La Nuova Italia d'Oltremare*, 2 vols., Milano, A. Mondadori, 1933, Vol. II, p. 1148.

sponse, the colonial government in 1923 decided to consolidate instruction in government elementary schools for Europeans under the management of the Daughters of St. Anne, leveraging their educational expertise³⁵ to ensure greater oversight of the educational environment. This reorganization culminated in 1929, with Decreto Governatoriale n. 4818 of October 17 appointing Sister Maria Del Poz, a member of the Daughters of St. Anne, as the educational director of the government elementary schools for Europeans in Eritrea, further centralizing educational administration.

Meanwhile, in 1926, Governor Jacopo Gasparini, responding to increased demands from the Eritrean population for advanced education³⁶, established the “Vittorio Emanuele III” school, funded by the Italian State. This institution, organized as a six-year program, aimed to promote «a process of real civilization»³⁷ among the native population, which was intended non-merely to impart knowledge but to encourage «the gradual assimilation of ideas, principles and system»³⁸.

In an additional effort to strengthen regulatory control over education and instruction, the government issued Decreto Governatoriale n. 4603 on September 8, 1928, standardizing the requirements for private schools. The decree mandated that all private institutions secure government approval³⁹ and required a minimum of six hours of Italian language instruction per week across all schools, for both Italian and Eritrean students.

Figure 1 shows the increase in student enrollment – both native and European – across the academic years from 1921-22 to 1931-32. Analysis of the data reveals consistent growth in European students’ numbers, which rose from approximately 200 in the 1921-22 academic year to around 1,400 by 1931-32. This trend is supported by historical data, which show that between 1913 and 1931, the Italian civilian population in Eritrea grew from 2,410 to

³⁵ With the arrival of the first group of the Daughters of St. Anne in 1886, the foundation of numerous schools in Eritrea commenced. The first educational institutions were established in 1895 in Keren, followed by those in Asmara in 1898, Saganeiti in 1904, Ghinda in 1906, Addi Caieh in 1908, Addi Ugri in 1909, Barentù in 1913, and Mehlab in 1922, among other locations (G.P. Carini, R. La Cordara, *Storia della scuola italiana in Eritrea*, Ravenna, Giorgio Pozzi, 2014, pp. 32-34).

³⁶ Telegram from Jacopo Gasparini (Asmara, May 22, 1925), in ACS, MAI, DG Affari Civili, IS, b. 161.

³⁷ Puglisi, *La scuola in Eritrea ieri e oggi*, cit., p. 112 (my translation).

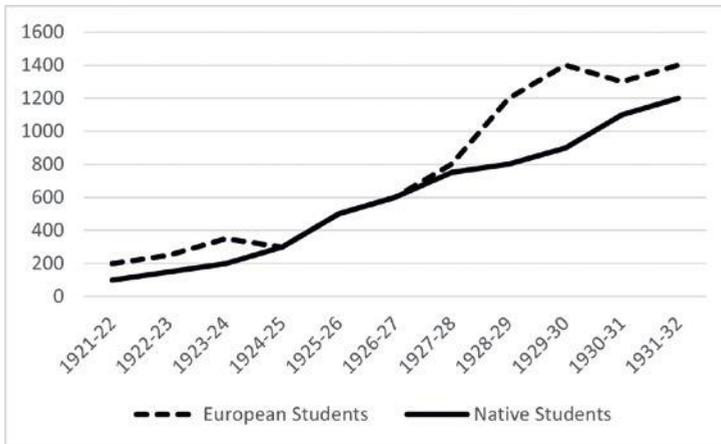
³⁸ *Ibid.* (my translation).

³⁹ In 1928, these directives were concretely implemented with the authorization to open several elementary schools for Italians in key colonial centers. Notable examples include those managed by the Daughters of St. Anne (Decreto Governatoriale n. 4618, October 2, 1928), the Catholic Mission School in Keren (Decreto Governatoriale n. 4646, December 19, 1928), and the Evangelical Mission School in Cullucù (Decreto Governatoriale n. 4647, December 22, 1928). In 1929, additional institutions were approved, such as the schools of the Evangelical Mission in Asmara (Decreto Governatoriale n. 4654, January 2, 1929 and Decreto Governatoriale n. 4673, January 25, 1929), and those in Adi Ugri (Decreto Governatoriale n. 4682 February 1, 1929).

4,188, with Italians born in Eritrea making up about 40% of the total Italian population in the colony⁴⁰.

Similarly, the enrollment of local students also demonstrated a steady upward trend, increasing from approximately 100 in the 1921-22 academic year to around 1,200 by 1931-32. This growth pattern of local students parallels that of European students, indicating that the rise in student numbers may be attributed to two primary factors. First, Eritrea's population saw a substantial increase, growing from 274,944 inhabitants in 1905 to 596,013 by 1931⁴¹. Second, there was a notable rise in interest in education among the local population, which contributed to increase in school enrollment among the local population.

Pic. 1. European and indigenous school population in Eritrea's colonial schools. Source: Piccioli, *La scuola e le istituzioni educative*, in Id. (ed.), *La Nuova Italia d'Oltremare*, cit., p. 1149.



2. The school system between 1931-1941

Following the Decreto Governatoriale n. 3808 of September 12, 1921, subsequent governors committed to promoting greater uniformity within the educational system. However, this uniformity was not always advantageous nor universally applicable, given the need for inevitable local adaptations and the establishment of new schools without formal provisions. Concurrently, the increasing educational and cultural aspirations of the Eritrean population and

⁴⁰ G.L. Podestà, *Mito e realtà del progetto demografico*, in G.P. Calchi Novati (ed.), *L'Africa d'Italia*, Roma, Carocci, 2021, p. 185.

⁴¹ G. Ciampi, *La popolazione dell'Eritrea*, «Bollettino della società geografica italiana», vol. 11, n. 12, 1995, p. 505.

the growing need for qualified native personnel in the increasingly complex industrial, commercial, and administrative sectors underscored the inadequacy of the elementary education available to the local population⁴². Moreover, the educational system and its curricula suffered from significant disorganization.

Rodolfo Micacchi, in his analysis of the challenges facing the Eritrean educational system, emphasized the difficulties encountered compared to those in Libya. First, in Eritrea, due to the relatively small immigration population, less importance was given to education and hence an extensive educational infrastructure for Italian students was unnecessary. Additionally, in schools for the native population, the variety of languages, customs, religions, and traditions among the different groups complicated efforts to establish a uniform educational system. Second, environmental and climatic conditions, alongside economic constraints, hindered the transfer of secular teachers to the region⁴³. In response to these challenges, Decreto Governatoriale n. 5226 of April 8, 1931, aimed to reform provisions related to the education of the local population. This reform sought to ensure that instruction adhered to government directives by consolidating educational content into a standardized framework.

The new educational system established three categories of schools: the school of arts and crafts, elementary school, and secondary school designated for native individuals and those considered assimilated. These institutions aimed to «prepare colonial subjects and assimilated individuals for the practice of arts, trades, and commerce, provide them with an adequate general education, and prepare them for public and private employment»⁴⁴.

One of the major innovations introduced was the establishment of three vocational schools in Keren, Adi Ugri, and Agordat, each offering a three-year program accessible to students of all religious backgrounds, thus eliminating the previous religious affiliation of these institutions. Public elementary schools adopted a four-year curriculum, with the addition of practical and agronomic subjects⁴⁵.

A significant advancement was the introduction of a secondary school for the native population, intended to provide regulated and restricted education

⁴² *Nuovo ordinamento scolastico per gli indigeni*, Report by Riccardo Astuto di Lucchese to the Ministro delle Colonie (Asmara, May 13, 1931), in ACS, MAI, DG Affari Civili, IS, b. 161.

⁴³ Micacchi, *L'istruzione elementare nelle Colonie italiane durante il primo decennio del Governo Fascista*, cit., p. 105.

⁴⁴ Decreto Governatoriale n. 5226 of April 8, 1931, art. 2 (my translation).

⁴⁵ *Scuole ed ordinamento scolastico in Eritrea*, in ASMAE, EMAI, MAI III, b. 37. This is a typewritten document without a date or signature, drafted after 1931. The established elementary schools included: “Vittorio Emanuele III” in Asmara, “S. Giorgio” in Adi Ugri, “S. Michele” in Saganeiti, a bilingual school in Massawa, and a bilingual school in Assab. In these institutions, the curriculum was structured around the following subjects: Italian language, general knowledge, history and geography, educational norms, arithmetic, geometry and drawing, local language, practical agricultural knowledge, and physical education (art. 5).

to meet the needs of the colonial system while reducing potential risks of socio-political unrest⁴⁶. Such risks could arise both from the demands of the local middle classes for higher levels of education⁴⁷ and from the government's partial willingness to support such educational advancement. Both scenarios were perceived as potentially threatening to the interests of the colony. However, one year later, this school was abolished because «its grandiose name created considerable misunderstandings among students whose aspirations often exceeded the common capacity»⁴⁸. It was subsequently replaced with a two-year advanced course intended to supplement the knowledge acquired during the initial four years of schooling⁴⁹.

In November 1932, with the issuance of Decreto Governatoriale n. 6275 on November 21, the Central Directorate of Primary Schools was established in Asmara. This organization was responsible for overseeing the technical and disciplinary aspects of all primary educational institutions in the colony, both public and private, and serving both Eritrean and Italian populations. Andrea Festa⁵⁰ was appointed as the central director, bringing with him extensive experience from his previous service in Libya. This Central Directorate functioned as a coordinating body to ensure the educational efficiency of the school system.

In 1935, during the war, all school buildings were requisitioned by military authorities, with the exception of the secondary school and the Italian

⁴⁶ *Nuovo ordinamento scolastico per gli indigeni*, cit.

⁴⁷ From 1905 onwards, Eritrea experienced a substantial increase in the export of Italian cotton textiles, establishing itself as the fourth largest market for Italy's cotton industry. In a context marked by the limited presence of European residents, this commercial expansion reflected the progressive integration of the local population into market economy dynamics. This development facilitated the emergence of a native middle class, whose social and cultural significance was highlighted in a 1931 report by Governor Riccardo Astuto, addressed to the Ministry of the Colonies. The report emphasized, among other points, the necessity of establishing secondary schools for the children of local elites and affluent families to prevent them from pursuing their education in Ethiopia (Podestà, *Mito e realtà del progetto demografico*, cit., p. 185).

⁴⁸ A. Festa, *Le istituzioni educative in Eritrea*, in Istituto Superiore di Scienze Sociali e Politiche Cesare Alfieri, Centro di Studi Coloniali (edd.), *Atti del secondo congresso di studi coloniali (Napoli, 1-15 ottobre 1934)*, 7 vols., Firenze, Tipografia Giuntina, 1935, Vol. II, p. 293 (my translation).

⁴⁹ *Ibid.*

⁵⁰ Andrea Festa, born in Savoia di Lucania on January 19, 1898, held significant positions in the field of education in Libya and Eritrea between 1919 and 1949. In 1926-27, he founded and directed the rural school for indigenous students at Suk el Giuma, where he also organized evening courses for Muslim natives. Later, he became the head of the central school for Muslim natives, the "Mussolini" School in Tripoli, where he promoted the integration of teaching and school management. From 1927 to 1932, he directed the Western Circle of Tripoli, which included special schools for Jewish and Muslim students, including the "Niccolò Tommaseo" school for students with trachoma. In 1932, with D.G. n. 6276 of November 22th, he was appointed Central director of elementary schools in Eritrea. (*Direzione Generale degli Affari Civili. Ispettorato Scuole n. 315589*, typewritten, signed by Mele, Rome, February 3, 1950, in ASMAE, EMAI, Ministero dell'Africa Italiana – Ispettorato scuole, 1606 Andrea Festa).

elementary school “Principe di Piemonte”, which were relocated to temporary facilities⁵¹.

Following the proclamation of the Empire, Italy recognized the strategic importance of developing an educational system for the indigenous population in Eritrea, addressing both newly annexed territories and previously colonized areas⁵². The primary objective became the expansion of elementary education, aimed at providing the local population with training suited to their needs while also meeting the requirements of the Italian community. Particular attention was given to establishing special sections for local female students, focusing primarily on domestic skills⁵³. This educational project was conceived as a fundamental instrument to «improve the spiritual living conditions of abandoned populations living in a primitive state, far removed from any manifestation of civilization»⁵⁴. Schools, alongside other institutions, were envisioned as means of transformation and spiritual uplift, positioning children at the center of «spiritual penetration»⁵⁵. Over time, this process was intended to extend to the adult population, fostering a broader civilizing mission, facilitated in part by the promotion of the Italian language⁵⁶.

Additionally, Regio Decreto Legge n. 1737 of July 24, 1936⁵⁷, was enacted to standardize the educational system across the Italy's colonies. The decree stipulated that oversight of public education would be entrusted to the Ministry of Colonies through the establishment of a school supervisory authority within each colonial government. This administrative structure was responsible for managing and overseeing both public and private schools through the work of a superintendent and a designated inspection and disciplinary team.

As for teaching staff, kindergartens and elementary schools could be entrusted to religious congregations dedicated to education, provided that these

⁵¹ A. Piccioli, *La scuola e le istituzioni educative*, «Gli Annali dell’Africa Italiana», vol. 3, n. 1, 1940, p. 677.

⁵² *Telespresso* No. 19543 from Alfredo Guzzoni to the General Governorship (June 22, 1936), in ACS, MAI, DG Affari Civili, IS, b. 161.

⁵³ During the 1934-1935 academic year, the total number of native students enrolled in both government and private schools reached 3,562, of which only 538 were female (Ministero delle Colonie, *Annuario delle Scuole coloniali. Anno scolastico 1934-1935*, Roma, Angelo Signorelli, 1935, pp. 33-34). Beginning in 1936, the elementary schools established for female native students adopted a predominantly practical approach, offering courses in domestic subjects such as cooking, ironing, laundry, hygiene, and cleaning, in addition to instruction in the Italian language. This type of training clearly reflected an orientation toward preparing young native women for domestic and social roles within their communities (A. Festa, *Le scuole femminili dell’Eritrea*, «I Diritti della Scuola», n. 19, 1937, pp. 300-301).

⁵⁴ A. Festa, *Presupposti e fini dell’azione educativa nei territori dell’A.O.I.*, in Congresso di studi coloniali, *Atti del terzo congresso di studi coloniali (Firenze-Roma, 12-17 aprile 1937)*, 9 vols., Firenze, G.C. Sansoni, 1937, Vol. VI, p. 127 (my translation).

⁵⁵ *Ibid.* (my translation).

⁵⁶ *Ibid.*, pp. 126-127.

⁵⁷ The decree was converted into Legge n. 268 on January 11, 1937.

congregations employed qualified personnel and operated in accordance with government directives and under the supervision of the educational authorities (art. 3)⁵⁸.

In this context, the educational system in Eritrea experienced significant expansion. Before the war, only 13 government schools operated in the region, serving both Italian and native populations. These schools were located across Asmara, Massawa, Keren, Adi Ugri, Adi Caieh, Ghinda, Assab, Saganeiti, and Agordat⁵⁹. However, between September and December 1936, 25 new primary schools were established: 11 within the former colony's boundaries (Barentù, Gheleb, Mezbà, Senafè, Tessenei, Zazzega, Ad Teclesan, Thiò, Arafali, Decamerè, Mai Adegà) and 14 in Tigray (Adua, Axum, Adigrat, Abbi Addi, Aragarè, Hauzien, Enticcio, Macallè, Quoram, Mai Ceu, Enda Medani Alem, Azbì, Enda Sellassiè, Samrè)⁶⁰. By February 10, 1937, a total of 37 primary schools were in operation, attended by 703 Italian students and 3,400 native students⁶¹.

The data presented in Table 1 further clarify the increase in the number of government schools and enrolled students between 1931 and 1939.

⁵⁸ However, an anonymous article published in 1938 reported that the colonial government, in collaboration with the Ministry, arranged for pre-existing schools in Eritrea from the previous three years to be entrusted to religious orders. Meanwhile, newly established schools, together with secular teaching staff recruited through a public competition organized by the Ministry of Italian East Africa, were to be centrally managed. This approach aimed to facilitate state control and prevent potential internal conflicts (*50 scuole primarie: 7000 allievi in Eritrea*, «L'Italia d'Oltremare», vol. 3, n. 22, 1938, p. 599).

⁵⁹ Ministero delle Colonie, *Annuario delle Scuole coloniali. Anno scolastico 1934-1935*, cit., pp. 33-34. In Eritrea, there were several government schools designated for Italians, including "Principe di Piemonte" in Asmara, "Amedeo di Savoia" in Massawa, "Edoardo de Amicis" in Keren, "Roma" in Adi Caieh, "Armando Diaz" in Adi Ugri, and "Giuseppe Sapeto" in Assab, along with a school in Ghinda. For the native population, there were schools such as "Re Vittorio Emanuele III" in Asmara, "San Giorgio" in Adi Ugri, "San Michele" in Saganeiti, "Salvago Raggi" in Keren, "Fernando Martini" in Massawa, and finally the school in Agordat, all operational during the 1934-35 academic year.

⁶⁰ *L'organizzazione delle scuole primarie*, signed by the R. Direttore Generale Andrea Festa, in ASMAE, EMAI, MAI III, b. 37. This is a typewritten document undated but drafted after 1937.

⁶¹ A. Festa, *4000 alunni nelle scuole primarie dell'Eritrea*, «L'Italia d'Oltremare», vol. 2, n. 4, 1937, p. 21.

Table 1. Number of Government Schools and Enrolled Students in Eritrea (1931-1939)

	1931-32 ⁶²	1933-34 ⁶³	1934-35 ⁶⁴	1936-37 ⁶⁵	1938 ⁶⁶	1939
Government schools for italians	7	6 ⁶⁷	7	6	17	24 ⁶⁸
Students in government schools for italians	872	846	884	777	2554	3045 ⁶⁹
Government schools for natives	5	7 ⁷⁰	6	29	30	32 ⁷¹
Students in government schools for natives	1390	1993	1620	3610	4177	4701 ⁷²

Source: author's organization.

On October 26, 1939, a meeting convened with senior ministerial officials and representatives from the Partito Nazionale Fascista to establish the foundational principles for colonial education, thereby reaffirming the guidelines that had been previously in place. It was decided that education should avoid «imparting knowledge to the natives that could alter their inherent tendencies and characteristics, as well as lead to potentially harmful mental distortions,

⁶² Ministero delle Colonie, *Annuario delle Scuole coloniali. Anno scolastico 1931-1932*, Roma, Angelo Signorelli, 1932, pp. 80-81.

⁶³ *Quadro dei servizi scolastici della Colonia Eritrea*, in ASMAE, EMAI, MAI III, b. 37.

⁶⁴ Ministero delle Colonie, *Annuario delle Scuole coloniali. Anno scolastico 1934-1935*, cit., pp. 33-34.

⁶⁵ Istituto centrale di statistica del Regno d'Italia, *Compendio statistico italiano 1938 – XVII*, Roma, Istituto poligrafico dello stato, 1938, p. 287.

⁶⁶ Piccoli, *La scuola e le istituzioni educative*, «Gli Annali dell'Africa Italiana», cit., pp. 678-679.

⁶⁷ In the academic year 1931-32 and 1934-35, the number of government schools designated for Italians was recorded as seven; however, in 1933-34, it was reported as six, due to the classification of the “Giuseppe Sapeto” elementary school in Assab as a school for native students in that year. In the sources concerning the year 1931-32 and 1934-35, this same school was instead classified as a school for Italians. This suggests that, prior to 1937, when racial laws were implemented, there was no strict distinction between schools for Italians and those for native students. Indeed, although the “Giuseppe Sapeto” elementary school is categorized as Italian in 1934-35, all registered students were Ethiopian, with no Italian students enrolled (Ministero delle Colonie, *Annuario delle Scuole coloniali. Anno scolastico 1934-1935*, cit., pp. 33-34).

⁶⁸ a) *Scuole elementari per nazionali dell'Eritrea al 31/12/1939*, in ASMAE, EMAI, MAI III, b. 37. This is a table attached to the report titled *Le scuole dell'Eritrea*, previously referenced.

⁶⁹ *Ibid.*

⁷⁰ Following the same reasoning as in note no. 66, the number of government schools for native students should not be considered as seven, as indicated in the Table 1, but rather six, due to the classification of the “Giuseppe Sapeto” elementary school in Assab.

⁷¹ b) *Scuole di stato per indigeni eritrei*, in ASMAE, EMAI, MAI III, b. 37. This refers to a table attached to the report titled *Le scuole dell'Eritrea*, previously cited.

⁷² *Ibid.*

especially in the political domain»⁷³. The primary aim was to train individuals «capable of performing auxiliary roles in the fields of administration and agriculture, and to enhance the distinctive features of local craftsmanship»⁷⁴. The curriculum would emphasize an adequate understanding of the Italian language and the acquisition of practical skills, tailored to the specific territorial contexts. Additionally, the importance of maintaining oversight over private schools operated by missionaries was underscored⁷⁵. Supporting this view, Giuseppe Bottai emphasized in his article written in 1939 that education should instill in the local population an awareness of their responsibilities, both «as enhancers of the Empire's economy» and «as its defenders», thereby highlighting the alignment between educational goals and the broader political and social objectives of the Fascist regime⁷⁶.

3. *Secondary school*

Regarding education for Italian students, Giacomo de Martino, the governor of Eritrea from 1916 to 1919, emphasized in his 1916 circular the urgent need for more effective intervention, given the disparity between the educational resources available in the colony and those in Italy.

In Italy, beyond the school and family, the supreme factor of education and culture is the environment in which a child continuously lives: readings, events, examples of lived experiences, lectures, theaters, newspapers, daily practice with more educated individuals, and the feeling of emulation—all of these, along with other factors, cooperate with the family and school to equip the soul and mind with the elements that constitute the education of civilized individuals. [...] In the colony, this is not the case. For a child attending school for the first time, having previously lived in the unrestricted freedom of the fields or in the streets, in constant contact with the indigenous population, and in an environment where, necessarily, the educational elements that are abundant in the homeland are lacking, it is essential that their soul and mind be fully formed or even rebuilt⁷⁷.

According to De Martino, it was essential that the commitment of educational personnel in the colonies be accompanied by «a firmer unity of direction and a more vibrant modernity of method»⁷⁸, objectives that could only be achieved through an active involvement of the government and the authorities

⁷³ *Scuole per sudditi coloniali*, Report by Attilio Teruzzi, (Rome, November 22, 1939), in ACS, MAI, DG Affari Civili, IS, b. 162 (my translation).

⁷⁴ *Ibid.* (my translation).

⁷⁵ *Ibid.*

⁷⁶ G. Bottai, *La scuola fascista nell'Africa Italiana*, «L'Impero illustrato», vol. 1, n. 9, 1939, p. 3 (my translation).

⁷⁷ *Pubblica Istruzione*, cit. (my translation).

⁷⁸ *Ibid.* (my translation).

responsible for overseeing the schools. Furthermore, the importance of schools as vital instruments for promoting and safeguarding national identity within the colonies was emphasized⁷⁹.

In this context, the demand expressed by families residing in the colony for an education that matched the specificities of colonial environment became clearly evident⁸⁰. The absence of a local higher education institution forced families to send their children to Italy, which created various difficulties. Young students were removed from their social and familial environments, and upon returning to the colony after their studies, they often found it challenging to readjust to local life⁸¹.

This need for renewal took shape with the establishment of educational institutions tailored to the colonial context. The first secondary school in Eritrea was founded in Asmara around 1916 and received official recognition through the Decreto Luogotenenziale of October 14, 1917. This decree governed the organization and operation of the school, which was designed to provide higher education for the children of Italians residing in the colony. The teaching staff was provided by assigning teachers from the ranks of middle schools in Italy, made available to the Colony by the government, and selected by the Ministry of Colonies upon the recommendation of the Ministry of Public Instruction.

The *Scuola Tecnica* underwent multiple transformations to meet the demands of the time. In the 1923-24 academic year, following the Riforma Gentile, it was discontinued and replaced by a *Scuola Complementare* and an *Istituto Tecnico Inferiore*. Later, by gubernatorial decree in 1925, the *Scuola Complementare* was restructured as a *Scuola Commerciale*, offering a four-year curriculum aimed at training local accountants and entrepreneurs⁸². In addition to the technical courses, which included bookkeeping, accounting, and commodity science, the curriculum also incorporated Arabic and English languages instruction. In the 1932-33 academic year, courses were introduced at the *Istituto Tecnico Commerciale* and the *Liceo Scientifico*. This initiative

⁷⁹ In a colonial context perceived as less civilized compared to the motherland, schools did not merely serve a purely educational function; they also acted as instruments of cultural dissemination, intended to guide and align the consciousness of young Italians. This perspective was echoed in the reflections of Camillo De Camillis, who asserted: «I will reiterate to them that the issue of public education, which in the motherland constitutes only one aspect of the social activity of public administration, assumes far greater importance in the colonies, where addressing it effectively represents an act of high political prudence and, at the same time, a duty toward those who, far from their homeland, work for its greatness and prosperity» (*Funzionamento della Scuola Tecnica*, Circular from the Direzione affari civili del Governo dell'Eritrea, signed by De Camillis, [Asmara, January 12, 1918], in ASDMAE, EMAI, AE, b. 852) (my translation).

⁸⁰ *Istanza*, typewritten, addressed to the Governor of the Colony, signed by various heads of families residing in Eritrea (Asmara, January 31, 1914), in ASMAE, EMAI, AE, b. 558.

⁸¹ A letter attached to the *Istanza*, typewritten and signed by Allano Antonio (Asmara, February 4, 1914), in ASMAE, EMAI, AE, b. 558.

⁸² *Le RR. Scuole medie di Asmara* (Asmara, February 20, 1937), signed by Giorgio Brunetti, in ASMAE, EMAI, MAI III, b. 37.

aimed to provide residents of the colony the opportunity to continue their education up to the pre-university level⁸³. However, due to low enrollment, the *Liceo Scientifico* was suspended after the first year for lack of students and was only resumed in the 1934-35 academic year, before being permanently closed in the 1935-36 academic year⁸⁴.

The introduction of Italian racial legislation in 1937 led to circumstances that prompted colonists to move their families to the colonies. This phenomenon led to an increase in the Italian population residing in the region, with a total of 165,267 Italian civilians recorded in the spring of 1939, compared to approximately 12 million Africans. The majority of the colonists, totaling 72,408, lived in Eritrea, making up 43.8% of the overall population⁸⁵. Specifically, Asmara experienced a significant increase in its Italian population, which grew from 3,500 in 1934 to 48,000 in 1939. In parallel, the native population rose from 12,000 to 36,000, thereby altering the demographic ratio between Italians and the local inhabitants⁸⁶.

This demographic growth profoundly impacted the educational system, necessitating a restructuring of secondary schools in the colony to meet the new demands of expanding Italian community. In response to these dynamics, the *R. Liceo-Ginnasio* “Ferdinando Martini” was established alongside the *Istituto Tecnico*⁸⁷, sanctioned by the Decreto Ministeriale of July 1, 1937. In the 1938-39 academic year, secondary schools registered a total of 811 students, marking a significant increase compared to the 200 students in 1936-37. Additionally, the *R. Istituto Tecnico* “Vittorio Bottego”, organized into two sections—commercial and surveying—was established by the Decreto Ministeriale of July 1, 1937. In addition to offering the curriculum mandated for corresponding Italian institutions, it included instruction in local languages and customs, with the aim of preparing students for roles in administrative and technical sectors. The basic course, lasting four years and common to both specializations, provided access to the advanced courses, which were also four years in duration. Upon completion of the program and passing the state examinations, students received diplomas as commercial experts and accountants or as surveyors. Furthermore, in the 1939-40 academic year, a *R. Ginnasio Inferiore* was established in Decamerè, alongside a *Istituto Magistrale* in Asmara⁸⁸.

⁸³ A. Festa, *L'istruzione elementare in Eritrea*, «Annali dell'istruzione elementare», 1933, vol. 8, n. 3, p. 234.

⁸⁴ *Le scuole dell'Eritrea*, cit.

⁸⁵ Podestà, *Emigrazione e colonizzazione in Libia e Africa orientale*, cit., p. 40.

⁸⁶ Id., *Mito e realtà del progetto demografico*, cit., p. 202.

⁸⁷ *Le scuole dell'Eritrea*, cit.

⁸⁸ *Ibid.*

Table 2 provides a clear representation of the number of students and the changes in the names of the secondary schools in Eritrea during the period from 1916 to 1939⁸⁹.

Table 2. Evolution of the number of students in higher schools in Eritrea (1916-1939)

Academic Year	School Name	N. Students	Academic Year	School Name	N. Students
1916-1917 ⁹⁰	Scuola Tecnica	57	1932-1933	Istituto tecnico inferiore	74
1917-1918 ⁹¹	Scuola Tecnica	73		Scuola commerciale (3 classes)	27
1919-1920 ⁹²	Scuola Tecnica	95		Istituto tecnico commerciale (1 class)	13
1920-1921	Scuola Tecnica	97		Liceo scientifico (1 class)	4
1921-1922	Scuola Tecnica	89		Total	118
1922-1923	Scuola Tecnica	73	1933-1934	Istituto tecnico inferiore	110
1923-1924	Istituto tecnico inferiore	50		Scuola commerciale (3 classes)	20
	Scuola complementare	19		Istituto tecnico commerciale (1 class)	25
	Total	69		Total	155

⁸⁹ To compile the table detailing the number of students and the types of secondary schools in Eritrea from 1916 to 1939, I primarily consulted the document titled *Alunni iscritti alle RR. Scuole Medie di Asmara negli anni scolastici dal 1919-1920 al 1936-1937 XV*. The data for the years 1916-1919 and 1937-1939 were drawn from other documented sources, as indicated. Additionally, within the same collection, I encountered another document titled *Alunni iscritti alle RR. Scuole Medie di Asmara 1927-1937*, which presents slightly different data. Unfortunately, there is no available information regarding the number of students attending secondary schools for the academic year 1937-1938.

⁹⁰ *Scuola Tecnica di Asmara. Dati relativi ai risultati avuti durante l'anno scolastico 1916-17 per 1° corso tecnico*, typewritten document without a date of drafting or signature, written after 1917, in ACS, MAI, DG Affari Civili, IS, b. 161.

⁹¹ G. Amadeo, *La R. Scuola Tecnica di Asmara nell'anno scolastico 1917-18. Relazione finale*, typewritten document signed by G. Amadeo, the director of the R. Scuola Tecnica of Asmara (Asmara, July 31, 1918), in ASMAE, EMAI, MAI III, b. 36.

⁹² *Alunni iscritti alle RR. Scuole Medie di Asmara negli anni scolastici dal 1919-1920 al 1936-1937 XV*, typedwritten, signed by Giorgio Brunetti, headmaster of the *Scuole Medie* of Asmara (Asmara, February 20, 1937), in ASMAE, EMAI, MAI III, b. 37. This document is attached to the document titled *Le RR. Scuole Medie di Asmara*, previously mentioned.

1924-1925	Istituto tecnico inferiore	34	1934-1935	Istituto tecnico inferiore	138
	Scuola complementare	19		Scuola commerciale (3 classes)	9
	Total	53		Istituto Tecnico commerciale (1 class)	26
1925-1926	Istituto tecnico inferiore	33	1935-1936	Liceo scientifico (1 class)	8
	Scuola commerciale	23		Total	181
	Total	58		1936-1937	Istituto tecnico inferiore
1926-1927	Istituto tecnico inferiore	44	Istituto tecnico commerciale		27
	Scuola commerciale	34	Liceo scientifico (2 classes)		10
	Total	78	Total	159	
1927-1928	Istituto tecnico inferiore	42	1938-1939 ⁹³	Ginnasio	397
	Scuola commerciale	44		Liceo classico	73
	Total	86		Istituto tecnico commerciale e per Geometri di Asmara	341
1928-1929	Istituto tecnico inferiore	44	Total		811
	Scuola commerciale	54			
	Total	98			
1929-1930	Istituto tecnico inferiore	47			
	Scuola commerciale	53			
	Total	100			

⁹³ Piccioli, *La scuola e le istituzioni educative*, cit., p. 677.

1930-1931	Istituto tecnico inferiore	47	1939 ⁹⁴	Liceo-Ginnasio di Asmara	467
				Istituto magistrale superiore di Asmara	44
	Scuola commerciale	52		Istituto tecnico commerciale e per Geometri di Asmara	408
	Total	99		Ginnasio inferiore di Decamerè	55
			Total	974	

Source: author's organization

On June 10, 1940, Italy's entry into the Second World War set off a period of profound transformation for the educational system in Eritrea. On February 22, 1941, an order was issued to close all schools in Asmara in response to the deteriorating wartime situation⁹⁵.

During the British occupation, numerous school buildings deemed strategically significant were requisitioned for military purposes, removing them from the control of the Italian administration. The secondary schools and elementary schools in Asmara were converted into shelters for refugees from Gondar, while the *Istituto Tecnico* became the headquarters for the air forces⁹⁶. However, towards the end of 1942, the new British administration took control of all schools intended for the Eritrean population, previously managed by the Italian School Superintendency, reorganizing and directly overseeing them through a dedicated Education Department⁹⁷.

Conclusion

The analysis of the Italian schools established in Eritrea between 1890 and 1941 reveals a complex interplay of educational policies, socio-economic dynamics, and broader colonial strategies. Demographic transformations, the

⁹⁴ *Servizi scolastici dell'Eritrea alla data del 31/12/1939*, in ASMAE, EMAI, MAI III, b. 37. This is a document attached to the report titled *Le scuole dell'Eritrea*, previously mentioned.

⁹⁵ Carini, La Cordara, *Storia della scuola italiana in Eritrea*, cit., p. 100.

⁹⁶ *La scuola italiana dell'Eritrea sotto l'occupazione britannica*, in ACS, MAI, DG Affari Civili, IS, b. 152. This is a typewritten document without the name of the author, signature, or date, but likely written after 1952.

⁹⁷ Carini, La Cordara, *Storia della scuola italiana in Eritrea*, cit., p. 101.

evangelical initiatives of missionaries, and the growing interest in the education of both the local populations and Italians contributed to shaping an educational system that, although initially poorly conceived, evolved under the influence of colonial domination objectives. This system ultimately fostered a colonial society where education served not only as a means of cultural formation but also as a ground for identity negotiation among the local population.

The educational system that was implemented mirrored deep structural inequalities, while simultaneously providing a space of opportunity for the growing demand for education among the indigenous population. This duality exposed an underlying tension between forces of assimilation and resistance. In this framework, schooling served a dual purpose: as a tool for social control and training oriented toward consolidating colonial authority, yet also as a place for the development of potential. This raises critical questions regarding the relationship between knowledge and power, and the ambivalent role of education as either a mechanism for emancipation or a means of subjugation.

Becoming Teachers: the Pedagogy Manuals of Normal Schools during the Franco Era (1939-1970)

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ABSTRACT: This research investigates the evolution and content of pedagogy manuals used in Spanish Normal Schools from the end of the Civil War to the enactment of the *Ley General de Educación* (1939-1970). It focuses on academic volumes addressing disciplines such as *Pedagogía*, *Historia de la Pedagogía*, *Educación y su Historia*, *Filosofía de la Educación*, *Metodología y Organización Escolar*, and *Prácticas de Enseñanza*. The primary objective is to comprehensively analyse the influence of these pedagogical texts on teacher training, with an exploration of several critical dimensions: how pedagogy as a discipline was presented, the representation of non-Catholic pedagogical movements, perspectives on the inclusion of experimental pedagogy, the ideal teacher model advocated, and the role of religious and Catholic ideals in shaping methodological proposals. Additionally, the article seeks to identify developments and changes over this period, highlighting any transformations in the teaching of pedagogical disciplines despite the educational policies and cultural directives of the dictatorship.

EET/TEE KEYWORDS: History of Education; Pedagogy manuals; Normal Schools; Spain; XX Century.

1. *The pedagogy textbook as a source of research*

Textbooks have been recognized as one of the most significant sources in the study of educational history. They provide crucial insights not only into the subjects taught in the various grades but also into teaching methods and practices, for which the textbook has long been – and continues to be – a key reference¹.

¹ For insights on the importance and heuristic potential of this source, see: A. Choppin,

Indeed, textbooks have historically represented, though not exclusively, the pivotal instrument of school life, representing essential navigational guide for student learning in both classroom and independent study contexts.

The content of textbooks reflects the national curricula of specific disciplines but also reveals the individual interpretations of their authors, who may convey particular points of view, cultural prejudices, or even ideas that diverge from the national indications. When analyzed together with sources such as historical curricula, ministerial surveys, student notebooks, and various school memoirs, textbooks offer an interesting means of understanding the ‘inside’ history of education.

Beyond documenting pedagogical discourse, textbooks hold critical significance in secondary schools preparing future primary educators. They have helped to define the goals and methods, thus significantly shaping the future of teaching. Not surprisingly, within the growing body of research on textbooks, several studies have already focused on pedagogy textbooks for mainstream schools².

Regarding the Spanish context, Teresa Rabazas Romero has conducted exemplary research on the pedagogy manuals used in normal schools from the founding of the first in 1839 until the beginning of the Civil War³. The later period, however, deserves a more in-depth and dedicated study.

This article examines the content and evolution of textbooks across various

L'histoire des manuels scolaires. Une approche globale, «Histoire de l'éducation», vol. 3, n. 9, 1980, pp. 1-25; Id., *Les manuels scolaires: histoire et actualité*, Paris, Hachette Education, 1992; A. Escolano Benito, *Tipología de libros y géneros textuales en los manuales de la escuela tradicional*, in A. Tiana Ferrer (ed.), *El libro escolar, reflejo de intenciones políticas e influencias pedagógicas*, Madrid, Universidad Nacional de Educación a Distancia, 2000, pp. 439-449; J. Meda, A.M. Badanelli Rubio, *La historia de la cultura escolar en Italia y en España: balance y perspectivas*, Macerata, eum, 2013, pp. 47-59; 119-138.

² On the subject see: A. Molero Pintado, *Los manuales de historia de la educación y la formación de los maestros (1900-1930)*, «Historia de la Educación», vol. 17, n. 1, 2000, pp. 251-288; M. Rouillet, *Les Manuels de Pédagogie. 1880-1920*, Paris, PUF, 2001; L.M.B. Da Mota Girão, *Tacto, bom senso e prudência nos manuais de pedagogia e didáctica do magistério primário: a dimensão hermenêutica do trabalho do professor (Portugal, 1870-1950): A dimensão hermenêutica do trabalho do professor (Portugal, 1870-1950): A dimensão hermenêutica do trabalho do professor (Portugal, 1870-1950)*, Tese de Mestrado em Ciências da Educação, Área de Especializado em História da Educação, Tutor prof. J. Barroso, Lisboa, Universidade de Lisboa, Academic Year 2005; A.C. Da Luz Correi, E. Peres, *Aprender a ser profesor a través de los libros: representación profesional, currículum escolar y modelos de aprendizaje en los manuales de pedagogía y didáctica para la formación de profesores de enseñanza primaria en Portugal (1870-1950)*, in J.-L. Guereña, G. Ossensbach, M.d.M. del Pozo (edd.), *Manuales escolares en España, Portugal y América Latina: (siglos XIX y XX)*, Madrid, Universidad Nacional de Educación a Distancia, 2005, pp. 195-214; D. Gatti Júnior, C. Monarcha, M.H. Camara Bastos (edd.), *La enseñanza de historia de la educación en perspectiva internacional*, Salamanca, FahrenHouse, 2019; P. Caocci, *La formazione magistrale in Italia negli anni del secondo dopoguerra e i manuali scolastici di pedagogia (1945-1968)*, «History of Education & Children's Literature», vol. XIX, n. 1, 2024, pp. 573-591.

³ T. Rabazas Romero, *Los manuales de pedagogía y la formación del profesorado en las escuelas normales de España (1839-1901)*, Madrid, UNED, 2001; Ead., *La evolución del ma-*

pedagogical disciplines used in Spanish normal schools from 1939 until the late 1960s. This period culminated in the *Ley General de Educación* (1970)⁴, which profoundly restructured the Spanish school system, including primary teacher education.

The sample includes approximately sixty manuals, sourced mainly from the Centro Internacional de la Cultura Escolar (CEINCE) in Berlanga de Duero⁵. These manuals span a range of subjects central to the pedagogical education of primary school teachers, covering general foundations such as *Pedagogía*, *Historia de la Pedagogía*, *Educación y su Historia*, and *Filosofía de la Educación*, as well as practical subjects like *Metodología y Organización Escolar* and *Prácticas de Enseñanza*.

2. Normal schools in Spain from the Plan of 1914 to the General Law of 1970

To understand the evolution of pedagogical subject textbooks between the rise of Franco's regime and the enactment of the *Ley General de Educación* of 1970⁶, it is essential to briefly outline the principal transformations that have characterized primary school teacher education. Spanish historiography has made significant contributions to this area, not only through studies on the evolution of normal schools⁷

terial escolar a través de los manuales de Pedagogía (1875-1936), «Revista española de pedagogía», vol. 243, n. 2, 2009, pp. 275-298.

⁴ For details on the characteristics, role, and impact of this law, see the essays in the recent special issue of the journal SEDHE, published on the occasion of the 50th anniversary of the law: «Historia y Memoria de la Educación», vol. 14, 2021.

⁵ I would like to take this opportunity to thank Professor Augustin Benito Escolano, former Professor of History of Education at the University of Valladolid and founder and director of the Center, for his gracious hospitality, invaluable advice, and numerous insights that have greatly enriched the study of the history and manuals of Spanish normal schools during the Franco dictatorship.

⁶ For information on the history of Spanish education during this period, see: A. Escolano Benito, *La educación en la España contemporánea. Políticas educativas, escolarización y culturas pedagógicas*, Madrid, Biblioteca nueva, 2002, pp. 159-218.

⁷ For information on the history of normal schools and the education of primary school teachers, see: M. Guzmán, *Cómo se han formado los maestros. 1871 a 1971: cien años de disposiciones oficiales*, Barcelona, Prima Luce, 1973; A. Escolano Benito, *Las Escuelas Normales. Siglo y medio de perspectiva histórica*, «Revista de Educación», vol. 269, n. 1, 1982, pp. 55-76; M. De Guzmán, *Vida y muerte de las Escuelas Normales. Historia de la formación del Magisterio básico*, Barcelona, Promoción Publicaciones Universitarias, 1986; J. Melcón Beltrán, *La formación del profesorado en España (1837-1914)*, Madrid, Ministerio de Educación y Ciencia, 1992; R. Rodríguez Izquierdo, *Formación de las maestras desde 1940 a 1970. Un análisis de los Planes de Estudio desde una perspectiva Histórico-Legislativa y de Género*, «Escuela Abierta», vol. 2, n. 1, 1998, pp. 63-81; A. Molero Pintado, *La formación del Maestro español, un debate histórico permanente*, «Revista de Educación», Extraordinary issue with theme *La educación*

but also through more focused research on specific institutions of this kind⁸.

In the 19th century, much like in other European countries, Spain saw the widespread establishment of *escuelas normales* – secondary institutions dedicated to teacher education. Moving into the 20th century, a crucial step was the reform plan introduced in 1914 by Minister Francisco Bergamín García. Through the Royal Decree of August 30, several innovations were enacted, including eliminating the traditional division between elementary and higher grades, introducing scholarships, establishing new annexed colleges, and a cap of fifty pupils per class. The curriculum had a strong cultural focus and emphasized professional education, mainly through apprenticeships in annexed schools. These institutions allowed future teachers to gain hands-on teaching experience in real pedagogical environments, aligned with the latest developments in pedagogical theory across Europe.

An essential transformation in the structure of normal schools occurred in 1931 with the decree of September 29, which restructured these institutions, elevating them to university status. Among the key advocates of this reform was Rodolfo Llopis Ferrándiz, the Director-general of primary education, professor at the normal school, and director of the influential «Revista de Escuelas Normales», a publication that kept pace with the latest developments in pedagogical theory across Europe.

en España en el siglo XX, n. 1 Extra, 2000, pp. 59-82; M.D. Peralta Ortiz, *La escuela primaria y el Magisterio en los comienzos del franquismo*, Madrid, Universidad Pontificia, 2012, pp. 151-206; A. Molero Pintado, *Modelos de formación de maestros* and M. Beas Miranda, J.A. Lorenzo Vicente, S. Montes Moreno, *Identidad profesional del magisterio español en el tardo-franquismo*, in T. González Pérez (ed.), *Reformas educativas y formación de profesores*, Madrid, Biblioteca Nueva, 2015, pp. 23-47, 49-80; F.A. Gómez, *La renovación metodológica en la formación de maestros. El caso de la escuela de magisterio de la Iglesia Escuni (1967-1983)*, Tesis Doctoral, Escuela Internacional de Doctorado – UNED, directora Gabriela Ossenbach Sauter, codirectora María Dolores Peralta Ortiz, 2023, pp. 102-142.

⁸ Some of the most significant works include A. Ávila Fernández, *Historia de la Escuela normal de maestro de Sevilla en la segunda mitad del siglo XIX*, Sevilla, Ediciones Alfar, 1986; J.F. Cerezo Manrique, *La formación de maestros en Castilla y León (1900-1936)*, Salamanca, Ediciones de la Diputación de Salamanca, 1991; A. Miñambres Abad, *L'Escola normal de Lleida. Una crònica dels seus primers 100 anys*, Lleida, Edicions de la Universitat de Lleida, 1994; A.S. Porto Ucha, *A escola normal de Pontevedra (1845-1940). O contexto curricular e social na formación do profesorado*, Santiago de Compostela, Universidade de Santiago de Compostela, 1994; A. Ávila Fernández, Á. Huerta Martínez, *La formación de Maestros de Primeras Letras en Sevilla y Cuba durante el siglo XIX*, Sevilla, Editorial Kronos, 1995; *A educación en Galicia (1669-1970). Aos 150 anos da creación da Escola Normal Superior. Textos escolares, escritos de Pedagogía, prensa educativa. Catálogo da exposición*, Santiago de Compostela, Universidad de Santiago de Compostela, 1999; A. Marco López, A.S. Porto Ucha, *A Escola Normal de Santiago de Compostela. De Escola Normal Superior a Escola Universitaria (1849-1996)*, Santiago de Compostela, Universidade de Santiago de Compostela, 2000; M.R. Domínguez Cabrejas, *La Escuela Normal de Maestros de Zaragoza (1844-1936)*, Zaragoza, Aragón en aula, 2002; F. Larossa Martínez, L. Maldonado Izquierdo, *Las escuelas normales de Alicante. Conservadurismo y renovación entre 1844 y 1931*, Alicante, Publicaciones Universidad de Alicante, 2012.

The legislation was then completed with the promulgation of new school regulations (17 April 1933). This new plan reorganized primary teacher education into three stages: cultural, professional, and final apprenticeship. The cultural stage was to take place during the higher baccalaureate. However, a transitional three-year *Formación Cultural* course, organized by the normal schools themselves, was offered for those lacking this qualification. The professional stage occurred within the same normal schools, which had evolved into post-secondary institutions by this time. This phase lasted three years, followed by a year-long apprenticeship during which students were assigned to an institution under the joint supervision of teachers from the normal schools and the Primary Education Inspectorate.

In addition to general pedagogical knowledge, the curriculum also included specific methodologies, placing a strong emphasis on teaching in kindergartens and working with children with disabilities. The reform introduced co-education, entrance exams with capped numbers, and streamlined pathway to the teaching profession. The 1931 reform positioned Spanish normal schools at the forefront of Europe, on par with German innovations, which had already integrated 'pedagogical academies' into university-type institutions.

After the end of the Civil War, the Spanish dictatorship repealed the legislation enacted during the Second Republic (1931-1936). Regarding teacher education, the regime reverted to a model similar to 1914, requiring only second-level schooling to qualify future teachers. An exceptional measure was introduced on February 10, 1940, with the approval of the so-called *Bachiller Plan*. This policy aimed to facilitate the qualification process for primary teaching for individuals holding a basic higher baccalaureate degree. This move reflected the need to address teacher shortages during a challenging historical period.

Initial work on the new system began with a provisional plan approved in 1942, which applied to the first year of study. Over the following years, further provisions were established for the remaining three years, culminating in approving a new law on July 17, 1945. This law, focused on primary education and teacher education, was further detailed by a ministerial order issued on October 9, which renamed these schools as *Escuelas del Magisterio Primario*.

Admission requirements included passing a closed examination, being at least fourteen years old, and having completed the first four years of baccalaureate studies. The program spanned three years and included practical hours in annexed schools. After extended debate and various proposals that shaped Franco's reconstruction, the 1945 plan ultimately endorsed a secondary-level model for teacher education institutions.

On July 7, 1950, a new regulation for the *Escuelas del Magisterio Primario* was approved. The regulation revised the curriculum to emphasize the following objectives: religious and moral education, political and social teaching, physical development, general cultural knowledge, theoretical professional instruction, and practical teaching experience.

This legislative order remained in place until the late 1960s, during the technocratic phase that shaped Spanish educational policies in the final years of Francoism. This period was influenced by the growing impact of international organizations, such as the OECD and UNESCO, which advocated for significant educational reforms to address the increasingly evident inadequacies in the Spanish system, as highlighted in the well-known 1969 *Libro Blanco*. One of the first reform initiatives was the 1967 revision of the normal school's curriculum, a substantial step forward in teacher preparation that prefigured elements later formalized in the Act of 1970.

Although the entrance test was eliminated, the 1967 reform introduced the higher baccalaureate as a requirement, effectively elevating teacher education to an academic level. The program included two years of disciplinary-focused teaching, followed by an examination. Upon passing this exam, students could progress to a third year, consisting of a paid apprenticeship. However, this plan was short-lived; it was soon revised amid the sweeping changes by the *Ley General de Educación* championed by Minister Villar Palasí and enacted in 1970.

The regulation permanently restructured the *Escuelas Normales*, renaming them *Escuelas Universitarias del Profesorado de Educación General Básica*. A 1972 law further clarified this transition. In 1971, an experimental plan for teaching activities was approved and later confirmed, with some modifications, in 1977. Aligned with the new *Enseñanza General Básica* system introduced in 1970, which mandated eight years of compulsory teaching, the teacher education program was structured as a three-year course that combined foundational and didactic subjects. The first year provided a common curriculum, while the following years specialized in fields such as language teaching, science, or humanities, with preschool and special pedagogy added in 1977. However, adapting to the university model proved challenging and led to issues that were only fully resolved in the 1990s.

3. *Pedagogical subjects in normal schools*

Between the post-war provisional plans and the passage of the 1970 Act, pedagogical subjects remained central in normal schools, though their organization varied across different plans. As with all textbooks, curriculum changes influenced the publication and updates of these materials. Before examining the content of these books, it is essential to consider the critical stages of this evolution and the distinctions among the pedagogical subjects.

To understand the distribution of pedagogical disciplines in normal schools during the Franco dictatorship, it is helpful to examine their allocation in the 1914 plan, which served as a model after the Civil War. *Pedagogía* was

introduced in the second year in this four-year program and continued into the third. The third year also included the more specialized *Prácticas de Enseñanza*. In the fourth and final year, *Prácticas de Enseñanza* continued alongside courses in *Historia de la Pedagogía* and *Rudimentos de Derecho y Legislación Escolar*.

As noted, the 1931 Normal Schools Act introduced significant innovations in teacher education. The professional curriculum included three annual courses, each focused on preparing students for their future teacher roles. In the first year, students studied *Psicología* and *Elementos de Filosofía*; the second year covered *Pedagogía*; and the third year included *Paidología*, *Historia de la Pedagogía*, and *Organización Escolar*. Each year also required six hours of weekly apprenticeship. However, with the advent of Francoism, the provisions of the Second Republic were repealed, and the four-year course from the 1914 plan was reinstated. Following provisional plans, the curriculum was revised again in 1945: *Pedagogía* and *Psicología General y Aplicada* were taught in the first year, *Filosofía de la Educación* and *Metodología y Organización Escolar* in the second, while *Psicología General y Aplicada* and *Historia de la Pedagogía* were included in the third year. The teaching of *Prácticas de Enseñanza* was confirmed in all three years.

The 1950 plan, which remained in effect for seventeen years, introduced several changes. *Pedagogía* was removed from the first-year curriculum and replaced with *Filosofía: Psicología, Lógica y Ética*. In the second year, alongside *Psicología: Pedagógica y Paidológica*, a new course titled *Pedagogía: Educación y su Historia* was introduced, merging general pedagogy with its history. In the third year, students studied *Pedagogía: Metodología General y Organización Escolar*. Additionally, a dedicated *Prácticas de Enseñanza* course was included each year.

This curriculum remained unchanged until 1967 when normal schools transitioned closer to university-level institutions. Admission now required a higher baccalaureate, and the program spanned two years, followed by a third year dedicated to an apprenticeship. The curriculum placed strong emphasis on specific disciplinary didactics – such as *Didáctica de las Matemáticas*, *Didáctica de la Geografía y Historia*, and *Didáctica de la Religión* – while also incorporating foundational disciplines, including pedagogical studies. In the first year, students completed courses in *Pedagogía y Historia de la Educación*, *Prácticas de Enseñanza*, *Psicología General y Evolutiva*, and *Filosofía y Sociología de la Educación*. In addition to these subjects, reinforced in the second year, there was the teaching of *Didáctica y organización escolar* and *Filosofía y Sociología de la Educación*, as well as *Prácticas de Enseñanza*. In the second year, these subjects were reinforced with additional courses in *Didáctica y Organización Escolar*, *Filosofía y Sociología de la Educación*, and *Prácticas de Enseñanza*.

The 1970 reform marked a significant transformation of Normal Schools.

They are now integrated into an academic framework and have a curriculum increasingly open to educational sciences, special pedagogy, and preschool.

4. *The sample analyzed: some common elements*

Before delving into the content of the volumes, we can begin by identifying some common elements among the analyzed manuals. One notable aspect relates to the authorship. Most editors of these works were directors or professors at normal schools or affiliated colleges. For instance, Antonio Gil Muñiz was a professor in Málaga, Cesáreo Herrero Salgado served as director of the affiliated college in Valladolid, and Eduardo Málaga García was a professor in Cáceres and a former inspector. Other prominent figures, such as Antonio Floriano Cumbreño, Emilio Latorre y Timoneda, Teodoro Agustín Rubio, Francisca Montilla, and Luis Alonso Fernández, held positions as professors in Madrid. Some authors, like Antonio Onieva, were inspectors, while others were university professors of philosophy and pedagogy, such as Consuelo Sánchez Buchon and Ángel González Álvarez. Additionally, a few were clergy members, such as Daniel Llorente, Bishop of Segovia. In particular, several authors, including Antonio Floriano Cumbreño, Gil Muñiz, Latorre y Timoneda, Ezequiel Solana, Francisca Montilla, and Luis Alonso Fernández, have published scholastic books dedicated to several pedagogical disciplines, such as general pedagogy, history of pedagogy and methodology.

In the 1940s and 1950s, these manuals exhibited a noticeable simplicity in graphic design. Covers were austere, layouts were minimalist, and illustrations or images within the text were largely absent. Some volumes included summary diagrams, as seen in Sánchez Buchon's popular volume⁹, while others provided brief summaries at the end of each lesson or chapter.

Since the 1960s, with the emergence of the so-called «second generation of textbooks»¹⁰, there has been a notable graphic evolution and substantial redesign. Sánchez Buchon's volume is emblematic of this change: in the 1969 edition, for example, the paper is thinner and glossier, the layout more flexible, with bulleted lists and bold text used to emphasize key concepts. Methodology books also saw significant updates, now enriched with illustrations and photographs, albeit still in black and white¹¹. Additionally, these books included

⁹ C. Sánchez Buchon, *Curso de pedagogía*, Madrid, Colección Padre Poveda, 1958.

¹⁰ See: A. Escolano Benito, *La segunda generación de manuales escolares*, in Id., *Historia ilustrada del libro escolar en España. De la postguerra a la reforma educativa*, Madrid, Fundación Germán Sánchez Ruipérez, 1998, pp. 19-47.

¹¹ C. Herrero Salgado, J.F. Pastora Herrero, *Prácticas de Enseñanza. Primer Curso. Adaptada al Cuestionario Oficial*, Valladolid, Editorial Minon, 1969.

exercises and review questions at the end of each chapter. Similar innovations appeared in Jesus Llopis's volume, which incorporated numerous images to illustrate the history of pedagogy¹².

Regarding the contents of the manuals, it is helpful to first explore those related to *Pedagogía* and *Historia de la Pedagogía* (which were combined from 1950 to 1967), and then to examine the more practical subjects: *Metodología General y Organización Escolar* and *Prácticas de Enseñanza*.

5. Textbooks on general pedagogy and the history of education

As noted, until 1950, teacher education included distinct disciplines such as *Pedagogía*, *Filosofía y Sociología de la Educación*, and *Historia de la Pedagogía*. Under the new plan, *Filosofía de la Educación* was removed, and *Pedagogía* was merged with *Historia de la Pedagogía*. Although this change led to the publication of new manuals covering both subjects together¹³, separate volumes on General Pedagogy and History of Pedagogy continued to be published and reprinted, suggesting that they were both still used within the same discipline.

The Pedagogy textbooks generally followed a three-part structure: first, an exploration of the concept of pedagogy, including its epistemological status and connections to other sciences; second, the core themes of general pedagogy, covering the aims of education, key participants, methods, didactic systems, and the physical, intellectual, and ethical development of students; and third, differential pedagogy, which addressed factors like age, gender, and aspects of special pedagogy. Additionally, these textbooks often included insights into child development, with principles of paidology and methods for assessing growth. The History of Pedagogy volumes provided a historical overview of the field, beginning from the Paleolithic era.

The syllabus then continued with studying ancient civilizations, including Eastern cultures, followed by examining classical pedagogical models. Significant emphasis was placed on religious Revelation and its impact on education¹⁴, with detailed coverage of Christian figures, traditions, and religious

¹² J. Llopis, *Historia de la educación: Obra adaptada al cuestionario de primer curso de las Escuelas Normales*, Barcelona, Jesus Llopis, 1969.

¹³ See: F. Montilla, *La educación y su historia*, Madrid, Prologo de Socorro Santos, Huerta, 1951; L. Alonso Fernández, *Pedagogía. Educación y su Historia*, Madrid, Impresos Marcos, 1953; E. Málaga García, *Educación y su historia*, Burgos, Hijos de Santiago Rodríguez, 1953; R. Vega Alonso, *Educación y su historia*, Madrid, Imp. Soler, 1952.

¹⁴ The figure of Jesus Christ was represented with great emphasis. In a chapter paradigmatically titled «La educación en los orígenes radicales de la actual cultura occidental» which discussed Jewish and Christian culture following classical culture, Jesus of Nazareth was intro-

congregations. The volumes then explored significant authors and periods from the Renaissance to contemporary movements. While Spanish contributions received considerable attention, substantial space was also devoted to the history of international, primarily Western, pedagogy. Most volumes included a specific section on Latin American pedagogy and educational contexts. Overall, the focus of these reconstructions leaned heavily towards the history of pedagogical ideas, though references to social and cultural realities, as well as school legislation, were also present.

The *Educación y su Historia* manuals integrated these two elements by first exploring the concepts of education and pedagogy, then tracing the history within the previously outlined historical framework. Notably, the historical perspective remains a fundamental component even in the pedagogy manuals, which are organized thematically.

The content of these manuals cannot be considered neutral in their presentation of pedagogical science and guidance for future teachers. They generally reflected an anthropological outlook rooted in a spiritualist perspective, emphasizing ethical education and the religious dimension. In a chapter titled *Tendencias actuales en la enseñanza*, the manual published by Edelvives underscores this orientation, clarifying: «La educación es incompleta cuando se limita a facilitar solamente la adquisición de conocimientos. Debe formar la voluntad, ilustrar la conciencia, elevar el alma hacia el bien supremo. Los países más cultos advierten la importancia de la enseñanza religiosa. Si por casualidad algún gobierno sectario la proscribiera de las escuelas oficiales, las escuelas privadas conservan celosamente la enseñanza de la religión»¹⁵. A sentence in Francisca Montilla's textbook emblematically represents a common perspective found in other texts as well: «La educación debe ser religiosa. De tal manera, que no puede limitarse a dar noticia de las principales verdades de fe, ni a transmitir siquiera el conocimiento completo de su contenido. La Religión será, por el contrario, la base de la tarea educadora, su motivo inspirador, su raíz, su apoyo, su culminación»¹⁶. In another volume, the same author writes: «Únicamente la doctrina católica tiene en cuenta la totalidad de la persona humana y confiere al hombre la plenitud de su ser y la grandeza sublime de su destino»¹⁷.

duced in a sub-chapter called *El Maestro divino*. These are the opening lines: «Extendido por todo el mundo conocido el imperio romano y gozando de paz, bajo el reinado de Augusto, se verificó el acontecimiento más extraordinario que han presenciado los siglos; la Segunda Persona de la Santísima Trinidad, Jesucristo, tomando carne humana por obra del Espíritu Santo, nació de María Virgen, pobre y desconocido, en el Portal de Belén. El Mesías prometido por Dios y anunciado por los Profetas, el Redentor del mundo, que habla de salvar a los hombres del cautiverio del pecado, 'vino a su propia casa y los suyos no lo recibieron'». F. Montilla, *Historia de la Educación*, Madrid, Graficas Andreas Martin, 1958, p. 64.

¹⁵ Edelvives, *Historia de la Pedagogía*, Zaragoza, Editorial Luis Vives, 1965, Vol. II, p. 399.

¹⁶ F. Montilla, *Teoría de la educación*, Madrid, Gráficas Andrés Martín, 1959, p. 23.

¹⁷ Id., *La educación y su historia*, Madrid, Prologo de Socorro Santos, Huerta, 1951, p. 42.

The connection to the Catholic faith is deeply ingrained, permeating various chapters and often explicitly expressed through the bishop's formal *imprimatur* and declarations of loyalty to the Catholic Church and its educational ideals¹⁸. Some books conclude with the phrase *Laus Deo*¹⁹. An emblematic example is the book by Sanchez Buchon, who, after sending the first edition to Paul VI, received a letter of esteem and encouragement from the Pope. This letter was subsequently included in the introductory section of all thirty editions published between 1954 and 1970.

The Vatican magisterium heavily influences the content of these volumes, with numerous references to encyclicals by popes such as Leo XIII, Pius X, and Pius XII. A central point of reference is the encyclical *Divini illius Magistri*, which is constantly quoted in all the manuals, including those focused on methodology and school organization²⁰. Notably, the second volume of the *History of Pedagogy*, published by Edelvives in 1935 and reprinted with additions in 1965, devotes its final chapter to the pedagogical encyclical of Pius XI²¹.

In terms of content, the historical sections of the pedagogy manuals emphasize the Catholic view and tradition. In tracing the evolution of pedagogical

¹⁸ In this regard, the following remark in the preface of a textbook is particularly significant: «No detallamos las innovaciones de la presente edición. El lector las comprobará por sí mismo. Diremos, sin embargo, que la modernidad no le resta ninguno de sus reconocidos y antiguos valores: sencillez, claridad, información, criterio católico e imparcialidad». Edelvives, *Historia de la Pedagogía*, cit., Vol. I, p. 12.

¹⁹ R. Blanco y Sanchez, *Tratado elemental de Pedagogía: Educación y Enseñanza*, Oviedo, Editorial «Hernando», 1941, p. 237; L. Alonso Fernández, *Metodología y organización escolar*, Madrid, Impresos Marcos, 1952, p. 167; A.C. Floriano Cumbreño, *Curso general de Didáctica (Metodología y organización escolar)*, Oviedo, Editorial Supra, 1947, p. 323.

²⁰ See: Edelvives, *Pedagogía general*, Zaragoza, Editorial Luis Vives, 1945, p. VI; E. Ubeda, *Lecciones de Pedagogía Fundamental*, Murcia, Imprenta Escuela Lourdes, 1945, pp. 141, 149, 153, 172, 181; L. Alonso Fernández, *Pedagogía elemental: obra adaptada a cuestionario oficial*, Madrid, Imprenta Sáez, 1946, p. 186; E. Solana, *Pedagogía general*, Madrid, Editorial Escuela Española, 1946, pp. 29-32; L. Alonso Fernández, *Filosofía de la Educación*, Madrid, Imprenta Saez, 1946, p. 145; D. Llorente, *Curso teórico práctico de pedagogía*, Valladolid, Editorial Casa Martín, 1948, pp. 3, 29, 32, 37, 42, 53; L. Alonso Fernández, *Pedagogía. Educación y su Historia*, cit., pp. 28, 196; E. Latorre Timoneda, T.A. Rubio, *Psicología pedagógica y psicológica*, Madrid, Imprenta Juan Bravo, 1955, p. 14; A. González Álvarez, *Filosofía de la Educación*, Madrid, Editorial Escuela Española, 1956, p. 103; F. Montilla, *Metodología y organización escolar*, Madrid, Editorial Imprenta y librería, 1956, pp. 102, 204-205, 208, 249; Sanchez Buchon, *Curso de pedagogía*, cit., p. 38; Montilla, *Historia de la Educación*, cit., pp. 253-255; T.A. Rubio, *Prácticas de enseñanza, primer curso. Obra adaptada al cuestionario oficial*, Madrid, Talleres de editorial magisterio español, 1958, p. 116; Montilla, *Teoría de la educación*, cit., pp. 27, 83, 86, 212; E. Damseaux, E. Solana, *Historia de la pedagogía: Completada hasta nuestros días por "Escuela Española"*, Madrid, Editorial Escuela Española, 1967, pp. 284, 543-549; P. Griéger, *Pedagogía general: Tratado de pedagogía*, Alcoy, Editorial Marfil, 1968, p. 23; Llopis, *Historia de la educación: Obra adaptada al cuestionario de primer curso de las Escuelas Normales*, cit., pp. 445-447.

²¹ Edelvives, *Historia de la Pedagogía*, cit., Vol. II, pp. 408-414.

thought, significant attention is given to the educational aspects of the Christian message. In a section aptly titled *Epílogo cristiano del clasicismo*, Antonio Floriano Cumbreño introduces the topic as follows: «El advenimiento de JESÚS, Nuestro Señor, es el hecho que viene a señalar al hombre su verdadero fin y su destino; ruta y destino que traspasan las fronteras de lo terreno para alcanzar un más allá y situarle, tras lo temporal y caduco, en las regiones infinitas de lo perdurable y eterno. JESÚS redime al hombre, señalándole las vías de su salvación mediante la sublimidad de su sacrificio y merced a las excelencias de su doctrina. Esta cambia los conceptos de la vida que regían las aspiraciones humanas del viejo mundo y, al concretar el fin supremo en supremos ideales, transforma la marcha vital de las sociedades y señala nuevos rumbos a las costumbres, sobre las bases de una renovada moral, que comporta, en sí la marca augusta de su divino origen»²².

The influence of Catholicism and the Vatican Magisterium is also evident in the adherence to specific views. Among these, the manuals explore the reasons for opposing coeducation²³, emphasizing the advantages of separate teaching paths for each sex²⁴ – a position strongly endorsed by *Divini illius Magistri*.

The texts therefore reaffirm the educational role of the Catholic Church, which holds a primary role alongside the family. Various manuals criticize the «posturas abusiva del Estado»²⁵ abusive stance of the State, which, in some countries, has claimed monopolistic control over teaching. It is important to remember that the 1945 Elementary School Act itself defined the school in this way in Article 15: «Escuela es la comunidad activa de maestro y discípulos, instituida por la Familia, la Iglesia o el Estado, como órgano de la educación primaria, para la formación cristiana, patriótica e intelectual de la niñe española».

There are numerous references to the Spanish Catholic pedagogical tradition, with authors such as Andrés Manjón, Alberto García Vieyra, Pedro Poveda, Víctor García Hoz, Rufino Blanco, Juan Zaragüeta, and Ruiz Amado

²² A.C. Floriano Cumbreño, *Los problemas educativos ante la historia. Historia de la pedagogía, Primer tomo, La pedagogía antigua y medioeval*, Madrid, Editorial Magisterio Español, 1942, p. 80.

²³ Edelvives, *Historia de la Pedagogía*, cit., Vol. II, pp. 406-407.

²⁴ «La coeducación es indefendible, porque si educar es adaptarse al educando en el desenvolvimiento de sus potencias *específicas*, en las materias de enseñanza e incluso en el método, fácilmente se advierte que los niños y las niñas no pueden recibir una misma educación. Al niño se le educa para potenciar sus facultades, formar su carácter *varonil* y prepararle para la vida dura y luchadora que ha de exigirle la formación de una familia. A la niña se la educa para potenciar sus facultades, intensificar su *feminidad* y ser una mujer de su casa, esposa fuerte y madre amorosa e inteligente de sus hijos, y también para, en su caso, crearse un porvenir independiente del matrimonio. En cualquiera de los dos casos, la educación no puede ser la misma». A.J. Onieva, *Metodología y Organización Escolar*, Madrid, Editorial Magisterio Español, 1950, p. 276.

²⁵ Montilla, *Teoría de la educación*, cit., p. 84.

prominently mentioned. Foreign authors' quotes are also abundant, primarily from the French-speaking pedagogy of the 19th and early 20th centuries, including figures like Félix Dupanloup, Martin Gillet, Frans De Hovre, and Désiré Mercier. Additionally, though to a lesser extent, Italian Catholic authors such as Don Giovanni Bosco, Mario Casotti, and Giovanni Calò are highlighted²⁶. The spiritualist approach predominantly draws from neo-scholastic inspiration²⁷, with numerous references to Tommaso d'Aquino and the authors associated with the Louvain Catholic circle. Manuals on the History of Pedagogy also devote considerable attention to this tradition, particularly noting its affirmation following the encyclical *Aeterni Patris*. This perspective influences several aspects of educational theory, most notably the tripartite view of education – emphasizing physical, intellectual, and moral dimensions²⁸ – as well as in the fundamental concepts of pedagogy and the frameworks used to articulate educational discourse.

In most volumes, the preliminary sections illustrate the epistemological status of the discipline. While the experimental dimension is acknowledged as highly important – Herbart's contributions are particularly valued – it is emphasized that the scientific approach alone is insufficient to address the educational problem fully. A distinct philosophical, rational, or metaphysical perspective is also deemed essential. In a short chapter titled *El justo medio*, Llorente argues: «No puede admitirse que la Pedagogía experimental sea la única Pedagogía, ni que ese método empírico baste para un sistema total de la misma. Por de pronto nada puede decirnos del fin de la educación, tema trascendental en nuestra ciencia. Muy poco nos ofrece acerca de la formación del entendimiento y de la voluntad. Prescinde generalmente de la religión y hasta de la moral misma»²⁹.

The spiritualist and Catholic inspiration also strongly influences the model of the teacher presented in these volumes, which dedicate a specific section to this topic. The ideal teacher is portrayed as a virtuous and exemplary figure, both inside and outside the classroom³⁰. One of the most significant examples

²⁶ Regarding the Italian context, there are numerous references to pedagogues of various backgrounds: from the positivist tradition to Maria Montessori, from Giovanni Gentile to the criminological school of Lombroso. Notably, the pedagogy of Lombardo Radice stands out for its strong impact, with most textbooks drawing on his work. For more on the influence of this Sicilian pedagogue in Spain, see Y. Álvarez González, *Giuseppe Lombardo Radice and his reception in Spain in the first third of the 20th century*, in E. Scaglia (ed.), *Giuseppe Lombardo Radice in the early 20th century*, Berlin, Peter Lang, 2023, pp. 111-121.

²⁷ Blanco y Sanchez's book refers to Matteo Liberatore and his volume *Del Compuesto humano* also published in Barcelona in 1882. Cf: Blanco y Sanchez, *Tratado elemental de Pedagogía: Educación y Enseñanza*, cit., p. 10.

²⁸ See: González Álvarez, *Filosofía de la Educación*, cit., p. 8.

²⁹ Llorente, *Curso teórico práctico de pedagogía*, cit., p. 26.

³⁰ An exemplary treatment of the subject can be found in the chapter dedicated to it in Edelvives's volume, *Pedagogía general*, cit., pp. 29-62.

is the view of Úbeda who, in identifying the primary qualities of a teacher, writes: «Primeramente, hay que considerar las cualidades religiosas y morales. En este orden el maestro ha de aspirar a la mayor perfección posible. «El alumno – dice Lombardo Radice – busca en el maestro su propia conciencia». El valor de un maestro como tal, pende, tanto de cómo se ofrezca él mismo como ejemplo, cuanto de su propia actuación positiva. Su vida religiosa y su vida moral ha de ofrecerse tan pura y tan recta, sobre todo, fan clara, a la luz de la sociedad, que sirva de firme cimiento, de valoración y de confirmación a su actuación profesional»³¹. All textbooks discuss the role of patriotic education, emphasizing that from an early age, students should be introduced to national values and knowledge of «hazañas españolas». Gil Muñoz, for instance, writes: «La escuela española ha de enseñar al niño a amar y reverenciar el pasado de la patria, sus glorias pretéritas. las hazañas de su historia, y entre todas y sobre todas las que ha hecho para siempre el nombre de España inmortal en los fastos de la historia universal; el descubrimiento, conquista y civilización del continente americano»³².

In various pedagogical and historical manuals, the ideological perspective also shapes the interpretation and portrayal of other educational currents. Especially in the 1940s and 1950s, attitudes toward non-Catholic pedagogues or viewpoints were strongly critical. These texts highlighted the potential harms and risks associated with perspectives considered partial or, to varying degrees, distorted. The main perspectives criticized were naturalism, socialism, anarchism, individualism, rationalism, and even nationalism, the latter blamed for attempting to reduce human life to that of the state.

Certain books specifically criticize a form of activist naturalism³³, both in its international expression – such as Dewey³⁴, who is sometimes classi-

³¹ Ubeda, *Lecciones de Pedagogía Fundamental*, cit., p. 176.

³² A. Gil Muñoz, *Tratado de la Educación*, Málaga, Librería Denis, 1958, p. 68.

³³ Francisca Montilla's critique of naturalism is notably uncompromising: «El naturalismo posee una noción incompleta del hombre: no ha querido reconocer en él más que el aspecto puramente natural, ignorando o negando otros aspectos mucho más valiosos y estimables. Tampoco se da cuenta de la vida real, poseyendo una visión de la misma vana y superficial, incapaz de satisfacer las aspiraciones humanas». Montilla, *La educación y su historia, Prologo de Socorro Santos*, cit., p. 38.

³⁴ «Las ideas de Dewey – Ubeda writes – se han extendido rápidamente responden al aspecto utilitario del pensamiento norteamericano. Mas no pueden aceptarse en sus principios ideológicos, cuando afirma que las cosas han de ser comprendidas en su origen y en su función, sin tener para nada en cuenta consideraciones supra naturales». Ubeda, *Lecciones de Pedagogía Fundamental*, cit., p. 183. Similarly, Alonso Fernández writes: «El gran defecto de Dewey es la ausencia de todo sentido religioso; además, el individuo es, en último término, fin de toda la vida social; en nuestra conciencia y en lo íntimo de nuestro ser buen pensamientos y acciones que escapan a la comunidad sin dejar de tener una considerable significación social, y no toda la vida ni la educación es actividad manual». L. Alonso Fernández, *Historia de la pedagogía*, Madrid, Imprenta Saez, 1946, p. 195.

fied among «socialist» and «atheist» educators³⁵ – and in the views of some Spanish authors like Luzuriaga³⁶. Several authors expressed concern over the possibility of socialist tendencies infiltrating activist approaches, sometimes through oversimplified representations³⁷. For example, in Francisca Montilla's book, *the Institución Libre de Enseñanza* is described as an expression of «pedagogical atheism» which, during the republican phases, was committed to opposing Spain's religious educational tradition³⁸.

It should be noted that the volumes published in the early 1940s still reflect the upheavals that profoundly impacted Spain during the Civil War³⁹. While the Dictator and the «Alzamiento Nacional»⁴⁰ are praised, the need to rediscover Spain's national pedagogical tradition, rooted in Catholic inspiration, is often emphasized. This tradition is argued to have often anticipated other international currents.

The History of Pedagogy volume by Damseaux and Solana is particularly

³⁵ Cfr. Montilla, *La educación y su historia, Prologo de Socorro Santos*, cit., p. 230; Id., *Historia de la Educación*, cit., p. 293.

³⁶ Cfr. González Álvarez, *Filosofía de la Educación*, cit., pp. 92, 178.

³⁷ «Una cosa es el «trabajo escolar» y otra distinta las «escuelas de trabajo», preconizadas en estas últimas décadas por Dewey, Kerschensteiner, Thorndike y otros, y que no son sino la preparación del niño para los sistemas políticos socialistas que aquellos autores preconizaron. Consideramos natural que al niño se le forme como futuro participante de «lo social», es decir, como muchacho que ha de estar encuadrado en la sociedad con un oficio, profesión o carrera que le permita cumplir sus fines humanos; pero estimamos erróneo formarlos como futuro adepto de determinadas agrupaciones político-sociales. Si rechazamos la formación técnica escolar, con más calor rechazaremos la futura preparación política de grupo o secta. La escuela española debe formar buenos católicos y buenos ciudadanos, preparados con la educación general suficiente, para que luego puedan elegir la profesionalidad que mejor les convenga. Otra cosa sería desnaturalizarla». Onieva, *Metodología y Organización Escolar*, cit., p. 52.

³⁸ «Los hombres de la Institución libre de enseñanza, estratégicamente situados con el apoyo suicida de la monarquía, fueron después los directores de la pedagogía y de la política republicana, que quiso imponer el laicismo, la coeducación y la escuela única, novedades calcadas en moldes extranjeros, contrarias a nuestras creencias, a nuestro temperamento y a nuestra tradición. En el extranjero, la pedagogía que no quiere intervenir el problema de orden religiosos y nada dice al niño sobre estas cuestiones, ha enaltecido a sus paladines, dándoles categoría de grandes reformadores. Así lo hizo con Ferriere, Dewey, Clapared, Deeryol [sic!]. El movimiento mundial denominado *educación nueva*, se apoya sobre postulados semejantes a los que ofreció a España la república de 1931». Montilla, *La educación y su historia, Prologo de Socorro Santos*, cit., p. 232.

³⁹ The manuals contain various references to the Caudillo. In the 1940 edition of Ezequiel Solana's book, there is an emblematic eulogy to the dictator, which was later removed in the 1946 edition: «Los deseos de muchos maestros y la necesidad de dar un medio para estudiar las cuestiones de Pedagogía general a los alumnos normalistas y bachilleres que aspiren a obtener el título de maestro, nos decidió a hacer esta nueva edición, que ofrecemos al público con el mejor deseo de servirles y de colaborar al engrandecimiento de la Patria ganada por nuestro invicto Caudillo para el Orden, el Trabajo y la Cristiandad». Solana, *Pedagogía general*, cit., p. 5.

⁴⁰ Edelvives dedicated an entire chapter to defending and promoting the recent educational and school reforms of the new regime, titling the chapter «El renuevo de la Cruzada española». Cfr: Edelvives, *Historia de la Pedagogía*, cit., Vol. II, pp. 364-370.

significant in this regard. The first edition was published in 1911 and subsequently revised and republished over the decades by the journal «Escuela Española». In the preface to the 1944 edition, the editors stressed the importance of reestablishing a national approach to pedagogy⁴¹, dedicating a specific section in each chapter to the Spanish contribution.

In the same volume, Franco's victory is represented as a pedagogical achievement, marking the beginning of a *Nueva España* capable of overcoming the educational and scholastic errors of the early 20th century⁴². In his presentation of Antonio Floriano Cumbreño's pedagogy manual, Alfonso Iniesta made similar remarks: «Entre las modas intelectualistas que triunfaron en la España sectaria anterior al Movimiento nacional, la pedagógica tuvo alcance máximo y virulencia disolvente. Múltiples manuales fueron traducidos para ponerlos al servicio de los Maestros españoles. No discutimos el volumen científico de su contenido, más o menos calificado o exacto, pero hacemos destacar una tacha común a todos ellos: su extranjerismo [...]. Sin examen de aclimatación imprescindible, sin pensar en la fisonomía propia del niño español y en sus reacciones específicas, se introdujeron todas las novedades. El fracaso fue estrepitoso, agravado por el sectarismo y las pasiones antirreligiosas y antipatrióticas puestas al servicio de todas las malas pasiones y de todos los intereses de clase»⁴³.

⁴¹ «Al emprender la tarea de enfocar el estudio de la Historia de la Pedagogía nos queremos situar de lleno desde el punto de vista de las ideas genuinamente nacionales y de las creencias religiosas, como ya entonces preconizaba nuestro padre y que constituyen hoy el ideal que impulsa el Movimiento de la Nueva España. El criterio español, hoy día, ha adelantado un paso gigantesco. La manera de ver limitada, por mil razones que no son de este lugar, durante el siglo XIX y principios del XX, a una introducción a veces tímida del factor España en el concierto del mundo, cambia hoy en virtud de nuestro poderoso resurgimiento espiritual, que hace a España situarse a la cabeza de la civilización y que en el campo de la enseñanza reivindica para la Pedagogía española el haber constituido en su universalidad la Interpretación del concepto católico de la educación en todos los ámbitos del mundo. Así, pues, hay que revalorizar figuras y doctrinas que el criterio antinacional y antipatriótico del espíritu liberal había oscurecido sectariamente, y hay que revisar valores que también sectariamente se habían exagerado». E. Damseaux, E. Solana, *Historia de la pedagogía: Completada hasta nuestros días por "Escuela Española"*, Madrid, Editorial Escuela Española, 1944, p. 6.

⁴² These considerations, which already appeared in the 1944 edition, are confirmed in the 1967 edition.: «Vino el glorioso Movimiento Nacional como una reacción enérgica y rotunda contra todas las teorías y todos los procedimientos que habiendo germinado en filosofías laicas y extrañas arraigaron en España al amparo de un liberalismo inconsciente y acabaron por desvirtuar las puras esencias de la noble tradición española. Y, naturalmente, el Caudillo del Movimiento no lo había de ser sólo de los campos de batalla, sino que, en su visión de gran estadista, Franco quiere infiltrar gérmenes de vida nueva en el cuerpo enfermo de la Patria y se dirige a los maestros y les dice (Salamanca, 1937): 'Habéis visto el resurgir de un pueblo, de una raza, al calor de los santos ideales de Patria y Religión' 'Sois vosotros, maestros, los que tenéis que cultivar los ideales nacionales y a los que os corresponde la misión extraordinaria y sagrada de forjar la grandeza de España'». Idd., *Historia de la pedagogía: Completada hasta nuestros días por "Escuela Española"*, Madrid, Editorial Escuela Española, 1967, p. 584.

⁴³ A.C. Floriano Cumbreño, *Estudios de Pedagogía*, Madrid, Editorial Magisterio Español, 1941, p. 7.

Similar observations can be found in Llorente's textbook, particularly in the section on contemporary pedagogy. After exploring the pedagogy of activism, the author writes: «Desgraciadamente, de la escuela nueva muchos han pasado a partidarios de la escuela única, no sólo en el sentido de que haya conexión entre los diversos grados y etapas de la enseñanza, sino en el masónico-marxista que, con el pretexto de igualdad y bien social, ahoga toda libertad, conculca los derechos de los padres y pretende implantar, como obligatoria, la escuela laica y coeducación en todos los grados. El Museo Pedagógico Nacional, cuando estuvo en manos de la *Institución Libre de Enseñanza*, propagó con el mayor empeño ese engendro masónico. El Señor, en su misericordia infinita, nos ha librado de semejante desgracia, dando el triunfo al glorioso alzamiento nacional, para bien de la niñez y de la juventud, de la Iglesia y de la Patria»⁴⁴. A negative portrayal of the association, and more broadly of the republican school, is also common in other textbooks⁴⁵.

Since the late 1950s, the rigorist attitude toward other pedagogies appears to diminish in the manuals analyzed, giving way to a more descriptive and conciliatory approach toward non-Catholic perspectives. One of the most notable examples of this more open attitude is the work of Consuelo Sánchez Buchón⁴⁶, who, influenced by Teresian pedagogy, was committed to developing a more open pedagogy that could engage in dialogue with contemporary educational debates⁴⁷.

6. *Methodology manuals*

Since the provisional plan of 1940, normal schools have greatly emphasized the methodological and practical aspects. While general pedagogy, alongside the philosophy of education, addressed the metaphysical and ethical dimen-

⁴⁴ Llorente, *Curso teórico práctico de pedagogía*, cit., pp. 486-487.

⁴⁵ To give just two examples see: Montilla, *Historia de la Educación*, cit., p. 293; Edelvives, *Historia de la Pedagogía*, cit., Vol. II, pp. 358-363.

⁴⁶ For more on the contribution of this congregation, see: T. Rabazas Romero, C. Sanz Simón, S. Ramos Zamora, *La renovación pedagógica de la Institución Teresiana en el franquismo*, «Revista de educación», vol. 388, n. 2, 2020, pp. 109-129.

⁴⁷ In this regard, he writes in his volume: «Finalmente, debo señalar que en toda esta labor he contado con la ayuda, ¡quien lo creyera!, hasta de quienes militan en los campos ideológicos más distantes, ya que la verdad se impone por sí misma. Por esto podemos apreciar, que en fondo de toda doctrina que responda a un pensamiento sincero, aun del hombre no creyente, se percibe sin gran dificultad, en medio de sus confusiones y equivocaciones, una pugna entre la verdad y el error que le hace vacilar y caer no raramente en contradicciones, y permite vislumbrar entre celajes, afirmaciones de auténtica verdad. Y nos place hacer constar que cuanto de bueno en ellos se encuentra – a veces no poco –, se halla siempre asentado, aun con plena inconsciencia, sobre Quien, aunque desconocido o rechazado, es ‘piedra angular de todo edificio’, causa eficiente, ejemplar y final de toda educación». Sanchez Buchon, *Curso de pedagogía*, cit., p. 15.

sions of the discipline, other subjects – particularly *Metodología* and *Prácticas de enseñanza* – introduced teachers to a scientific understanding of the child and effective teaching methods. In this context, the teaching of *Paidología*, focused on defining the characteristics, development, and diversity of children's lives, is also of great interest.

During this period, the manuals followed the guidelines of the 1945 and 1950 plans, which were very similar in terms of program content. Methodology and school organization were presented as two distinct yet interconnected parts. The first part began with foundational principles of general methodology, covering topics such as the purpose of didactics, distinctions between educational methods, and principles for evaluating children on both anthropometric and intellectual levels. A significant portion was dedicated to special methodology, focusing on the didactics of specific subjects – religion, language, mathematics, science, art, and vocational work. For each discipline, the manuals outlined curricula, proposed teaching activities, and offered lesson suggestions. Beyond this general framework, the various manuals provided unique perspectives and insights. For example, Antonio Floriano Cumbreño included a brief history of each subject's teaching.

The section on organization always began with preliminary aspects related to the concept of a school and its aims. The program then delved into the technical aspects of buildings, covering topics such as classroom ventilation, sun exposure, bathroom requirements, and open-air spaces. Attention was given to common educational spaces like the library, school museum, and gymnasium. The manuals discussed the classroom, furniture, the importance of classroom decor, desk arrangement, and teaching aids.

The manuals also covered various school types, such as early childhood schools, single-room, rural, and mixed schools, with a typical emphasis on foreign school systems. They examined classroom organization in detail, including aspects of discipline, correction methods, and school inspections.

In addition to the methodology books, there were *Práctica de enseñanza* texts, which supported the practical education provided to students throughout all academic years. These books expanded on elements from the methodology texts and offered useful tools for classroom work, including evaluation sheets, teaching unit models, and dialogue-based lesson plans.

The practical dimension of these two disciplines should not imply that they were presented neutrally. Instead, they consistently reflect and align with the broader educational project for future teachers mentioned above. These volumes also reveal a strong influence of Catholic pedagogy, with numerous references and citations even at the practical-methodological level, prominently featuring figures like Manjón and Poveda. Other authors specializing in didactics and experimental pedagogy are also referenced. Notably, the works of Raymond Buyse are frequently cited, especially concerning the connection

between pedagogy and experimental research⁴⁸. Overall, a practical approach and the application of scientific methodology are emphasized, though several authors stress the need to balance this with rational pedagogy

All the volumes emphasize the significance of the new education movement and activism, highlighting key innovations it introduced. However, several authors note that some of these ideas had previously surfaced⁴⁹. Using the Spanish context as a reference, some authors underscore the pioneering contributions of Andrés Manjón's Ave Maria schools, particularly in the areas of active and outdoor education. Regarding instructional choices, the textbooks reflect a strong influence from Decroly's global method⁵⁰, which was then popular in several countries, including Italy.

Generally, all sections of these volumes are inspired by a vision in which the religious dimension serves as the core and unifying structure of teaching. It is no coincidence that religious teaching is always presented first in the sequence of special didactics. A significant portion of didactic instruction is dedicated to religious teaching, emphasizing its moral importance. References and appendices related to this dimension also appear in other sections. For instance, the section on the teacher's profile consistently begins with reflections on their qualities and education. While considering the professional aspects, all manuals underscore the ethical and moral role of the teacher, which is seen as grounded in a solid religious foundation. For example, Francisca Montilla, author of several popular volumes, writes: «Todo Maestro tiene que ser catequista. Pero no un catequista negligente, que se da por satisfecho haciendo que sus alumnos aprendan de memoria las preguntas de libro llamado Catecismo. El Maestro tiene que ser catequista educador, con igual sentido de responsabilidad y entrega que el Pontífice Pio X pedía a los Ministros de la Iglesia en su Encíclica *Acerbo Nimis*; entendiendo que la formación catequista de su alumnos es 'su obligación más estrecho y que no deben ponerse delante de ellos sin haberse antes preparado con estudio y seria meditación'»⁵¹. In a similar vein, Rubio also writes: «Varias son las notas fundamentales que podríamos dar de lo que se necesita para ser un buen Maestro. La labor educativa es tan comple-

⁴⁸ A. Gil Muñoz, *Didáctica. Metodología y Organización Escolar*, Málaga, Librería Denis, 1954, p. 139.

⁴⁹ Alonso Fernández's considerations are particularly significant: «Las escuelas al aire libre funcionan en Granada, por la iniciativa del ilustre educador don Andrés Manjón, desde 1888, dieciséis años antes que la más antigua del Extranjero, fundada en 1904 en Chalotemburgo [sic!], cerca de Berlín, según el testimonio de don Rufino Blanco». Alonso Fernández, *Metodología y organización escolar*, cit., p. 105.

⁵⁰ See: E. Málaga García, *Metodología y Organización Escolar*, Burgos, Hijos de Santiago Rodríguez, 1954, p. 86; Montilla, *Metodología y organización escolar*, cit., pp. 55-59; Rubio, *Prácticas de enseñanza, segundo curso. Obra adaptada al cuestionario oficial*, cit., pp. 94-98; Onieva, *Metodología y Organización Escolar*, cit., pp. 112-114; Gil Muñoz, *Didáctica. Metodología y Organización Escolar*, cit., pp. 159-160, 515-517.

⁵¹ Montilla, *Metodología y organización escolar*, cit., p. 38.

ja, que para llegar en ella a la perfección se necesitan dotes tan singulares y especiales que es difícil encontrarlas vinculadas en una sola persona. Solamente el Divino Maestro poseyó en grado eminente todas las cualidades intrínsecas y extrínsecas para el ejercicio de su divina misión»⁵².

Some historical evaluations also highlight the role of Christianity. In sections devoted to special education, there is often a brief historical overview of institutions for disabled children. Several authors acknowledge the contributions of religious congregations in caring for these individuals and, more broadly, emphasize the inclusive sensitivity fostered by Christianity. Among the many examples, we focus on the Methodology textbook by Málaga García, who observes: «El Cristianismo respetó la vida de todo anormal, cualquiera que fuese la deficiencia, debiendo a nuestra Religión el respeto a su vida. Se inició con ello una etapa más humana, pero en cuanto a su educación y utilización, hasta bien entrada la Edad Moderna, ningún país se preocupó de ellos»⁵³.

When analyzing the didactics of various disciplines, emphasis was often placed on the educational and moral dimensions of the subjects. In introducing the teaching of history, for example, Gil Muñiz advised future teachers that: «La Enseñanza de la Historia ha de ser mórale». «El niño – writes – tiene que formular juicios y dar su opinión acerca de muchos personajes y sucesos y, por consiguiente, ha de ejercitar su conciencia con la formación de tales juicios. Además, la Historia predica con ejemplos, y los ejemplos ejercen más influencia, como sabemos sobre todo en los jóvenes-que los preceptos morales. Ella presenta ejemplos de todas clases; héroes que se sacrifican por la patria, mártires que ofrendan su vida a Dios, gentes honradas que dedican todas sus energías al trabajo, egoísmos, ambiciones, traiciones, inmoralidades... El maestro debe aprovechar todos esos elementos, que la Historia le ofrece, para despertar en los niños sentimientos de amor y admiración hacia lo bueno y de odio y repulsión hacia lo malo»⁵⁴. References to the religious dimension also appear in volumes covering other disciplines, such as art teaching⁵⁵.

These volumes, especially the sections addressing educational institutions, emphasize the importance of the family over state schools and defend freedom of education. Additionally, they underscore a critical stance on coeducation⁵⁶.

⁵² Rubio, *Prácticas de enseñanza, primer curso. Obra adaptada al cuestionario oficial*, cit., p. 116.

⁵³ Málaga García, *Metodología y Organización Escolar*, cit., p. 267.

⁵⁴ Gil Muñiz, *Didáctica. Metodología y Organización Escolar*, cit., pp. 286-287.

⁵⁵ Here is the incipit of the chapter titled *La educación estética en la escuela primaria*: «Un recuerdo de belleza es una alegría para siempre. Se goza espiritualmente ante una colección de cuadros de pintura, en un concierto, en un jardín, al contemplar un grandioso o pintoresco paisaje que Dios nos ofrece gratuitamente en plena naturaleza. A nadie le están prohibidos los goces de carácter estético, muchos de ellos totalmente gratuitos». Málaga García, *Metodología y Organización Escolar*, cit., p. 98.

⁵⁶ In Antonio Floriano Cumbreño's volume, for example, we read: «La coeducación por consiguiente es una modalidad escolar más que éticamente peligrosa, pedagógicamente equivocada.

Even in the section on classroom setup and furniture, references to the importance of the religious dimension can be found. For instance, we read: «el Crucifijo no se mantiene en la condición de elemento decorativo, olvidado a fuerza de verlo siempre a igual distancia inasequible. Su incorporación a la escuela, después de nuestra gloriosa Cruzada de liberación, tiene otro significado. Ya no es un símbolo religioso que recuerda la postura confesional del Estado, oficialmente proclamada. Su presencia, delante de los niños, significa que Cristo informa la educación entera y que los pequeños le pertenecen totalmente y por lo mismo, lo aman y le rinden culto de adoración rezando ante El y prodigando a su bendita imagen actos de devoción y de homenaje. Por eso el Crucifijo debe colocarse siempre a una altura conveniente, para que los niños no pierdan nunca el recuerdo de su presencia y se acostumbren a rezarle, a adornarlo con flores a encomendarle sus trabajos y ocupaciones, etc.»⁵⁷.

Teaching manuals also include references to and tributes to political power, including recommendations for celebrating *Caudillo Day* with children as part of educational activities⁵⁸.

Conclusions

While it would be beneficial to expand the sample of volumes studied, this research has identified some common elements in Spanish pedagogical textbooks during Francoism, shedding light on the content and perspectives of teacher education in that period. Despite some variations and nuances, the textbooks reflect a strong alignment between the pedagogical approaches promoted by the authors and the ideological orientation of the Dictatorship, which was distinctly marked by a national-Catholic influence. Notably, these volumes emphasize the Spanish and European spiritualist pedagogical traditions, displaying a certain disapproval toward some figures of activism pedagogy and a decisive critique of the socialist and anti-religious traditions that influenced certain phases of the Republic.

The analysis of these volumes reveals a vision of the teacher not only as an instructor of basic literacy but also as a moral and patriotic role model, with the task of promoting Christian values and love for the nation. In teaching methodology and practice, there is a clear effort to incorporate these principles

No la culparemos exageradamente como fuente de inmoralidad; pero sí como consecuencia de conceptos inmorales y anticristianos que justifican plenamente su condenación». Cumbreño, *Curso general de Didáctica (Metodología y organización escolar)*, cit., p. 276.

⁵⁷ Montilla, *Metodología y organización escolar*, cit., pp. 122-123.

⁵⁸ Rubio, *Prácticas de enseñanza, segundo curso. Obra adaptada al cuestionario oficial*, cit., pp. 139-140.

within the educational framework. At the same time, the methodological sections show a critical examination of international pedagogical debates, including some perspectives that go beyond strictly Catholic ideology. Furthermore, some authors show a gradual opening and shift away from more rigorist approaches, reflecting the nuanced and varied nature of Spanish pedagogy at the time, which was far from monolithic.

Italian textbooks in Brazil: school material culture, transnational circulation and fascist ideology in Italian Schools Abroad*

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ABSTRACT: This study analyzes Italian textbooks produced for Italian schools abroad, focusing on those circulated in Brazil during fascism. It explores their covers, symbols, colors, and visual narratives as transnational propaganda tools to promote Italian culture. The research highlights textbooks' role in shaping school material culture, linking pedagogy, cultural policies, and fascist ideology. By examining these materials in a transnational context, the article contributes to understanding the relationship between materiality, ideology, and education.

EET/TEE KEYWORDS: School material culture; Fascist textbooks; Education and advertising; Book covers; Ideology in education; Brazil; XX Century.

Introduction

The study of textbooks and school publishers is a consolidated field in educational historiography¹, involving analyzes that address both the pedagogical aspects and the social, political and cultural contexts that influenced its

* This article is part of a research project that seeks to identify, catalogue and analyze the Italian textbooks that circulated in Italian schools in the South American context of the countries of Brazil and Argentina during the 20 years of fascist rule. This research was supported by The São Paulo research foundation (*Fundação de Amparo à Pesquisa do Estado de São Paulo* – FAPESP n. 2023/16884-7 and FAPESP n. 2022/15183-2).

¹ R. Sani, A. Ascenzi, *Il libro per la scuola tra idealismo e fascismo: L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radia ad Alessandro Melchiori (192-1928)*, Milano, Vita & Pensiero, 2005; Idd., *Il libro per la scuola nel ventennio fascista: la normativa sui libri di testo della Riforma Gentile alla fine della Seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizione, 2009; A. Barausse, *Il libro per la scuola*

production and circulation. Within this category of research, a particular segment refers to textbooks intended for Italian schools abroad², a theme that, although less explored, reveals the extent and complexity of an Italian educational project beyond Italian national borders. These books began to circulate in the so-called *Scuole italiane all'estero* since the late Nineteenth century,

dall'Unità al fascismo, La normativa sui libri di testo dalla legge Casati alla riforma Gentile (1861-1922), Macerata, Alfabetica Edizione, 2008; G. Chiosso, *Libri di scuola e mercato editoriale: Dal primo Ottocento alla Riforma Gentile*, Milano, FrancoAngeli, 2013; A. Barausse, *Nonostante tanto diluvio di libri scolastici: I libri di testo per le scuole elementari e le indagini ministeriali di Bargoni e Bonghi durante gli anni della Destra Stroica (1869-1875)*, Lecce-Rovato, Pensa Multimedia, 2018; C. Bittencourt, *Livros didáticos entre textos e imagens*, in C. Bittencourt (ed.), *O Saber histórico na sala de aula*, São Paulo, Contexto, 1997.

² A. Barausse, "Una impronta di italianità": os livros didáticos para as escolas étnicas italianas no Brasil entre o liberalismo e o fascismo, «Cadernos de História da Educação», vol. 18, n. 2, 2019, pp.329-350; Id., *Il libro per la scuola dall'Unità al fascismo. La normativa sui libri di testo dalla legge Casati alla riforma Gentile (1861-1922)*, cit.; Id., *Os livros escolares como instrumentos para a promoção da identidade nacional italiana no Brasil durante os primeiros anos do fascismo (1922 – 1925)*, «Revista História da Educação», vol. 20 n. 49, 2016, pp. 81-94; Id., *The construction of national identity in textbooks for italian schools abroad; the case of Brazil between the two World Wars*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 425-461; P. Bianchini, *Pátria, raça e civilização. Instruções para uma emigração bem-sucedida nos manuais escolares italianos de Geografia entre o final do século XIX e o início do século XX*, «Cadernos de História da Educação», vol. 18, n. 2, 2019, pp. 309-328; R. Castro, *Pesquisa histórico-educativa e a imigração italiana: uma revisão dos estudos*, «Revista História da Educação», vol. 27, 2023, 2023, pp. 1-29; T. Luchese, *...libriccini, tutto l'amore che nutro per l'infanzia. Syllabaries written and printed in Brazil to the Italian ethnic schools (1906-1907)*, «History of education & Children's Literature», vol. XIV, n. 2, 2019, pp. 467-489; Ead., *'E não nos deixeis cair em tentação': livros de leitura religiosa do governo fascista para as escolas italianas no Brasil (anos 20 e 30 do século XX)*, «Cadernos de História da Educação», vol. 18, n. 2, 2019, pp. 368-385; Ead., *Da Itália ao Brasil: indícios da produção, circulação e consumo de livros de leitura (1875-1945)*, «História da Educação», vol. 21, n. 51, 2017, pp. 123-142; Ead., *Quando il Mondo era Roma?: livros escolares para fascistizar os italianos no exterior, o caso brasileiro (1922-1938)*, «Cadernos de História da Educação», vol. 21, n. 2, 2022, pp. 19-17; T. Luchese, A. Barausse, *Apresentação – Escolarização, livros escolares e movimentos migratórios*, «Cadernos de História da Educação», vol. 18, n. 2, 2019, pp. 305-308; T. Luchese, K. Vendramin, P. Ghellere, *Uma gramática de italiano impressa no Rio Grande do Sul: aproximações da história do livro escolar produzido para escolas italianas (1896)*, «Revista Brasileira de Alfabetização», vol. 1, n. 18, 2022, pp. 1-15 C. Panizzolo, *Livros de leitura e a construção da identidade nacional de crianças italianas e descendentes (São Paulo no início do século XX)*, «Revista Acta Scientiarum. Education», vol. 41, n. 1, 2019, pp. 45-86; Ead., *Livros escolares para a escola elementar italiana nos dois lados do Atlântico: o estudo do Libro d'appunti de Giovanni Soli (entre o final do século XIX e início do século XX)*, «Cadernos de História da Educação», vol. 21, n. 2, 2022, pp. 1-25; Ead., *Scuole italiane all'estero: a study on reading books circulating in Italian ethnical schools in Brazil (Late 19th and early 20th Century)*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 447-466; C. Panizzolo, M. Warde, *Circulação transnacional de livros de leitura e de manuais pedagógicos (entre fins do século XIX e início do século XX) – Apresentação do dossiê*, «Cadernos de História da Educação», vol. 21, n. 1, 2022, pp. 1-22; R. Castro, *Livros didáticos italianos, propaganda fascista e a identidade italianidade no exterior: o manual didático I fatti degli italiani e dell'Italia*, «Revista Brasileira de História da Educação», vol. 25, n. 1, 2025, pp. 1-25.

following Italian migratory flows to different parts of the world. However, it was in the Fascist period that books abroad gained significant momentum³, becoming strategic tools to reinforce Italianness among emigrant communities, while promoting the regime's values and ideals. In particular, this article will deal with Italian textbooks that circulated in the Brazilian context, standing out due to the large Italian immigration flow that was destined for Brazil. These publications constituted an essential part of the effort to maintain and strengthen the cultural and linguistic connections between the emigrated Italian communities and their homeland, playing a central role in the Italian schools established in various regions of Brazil. During the fascist regime, textbooks also served as strategic tools to Italianize communities outside Italy⁴. Through these materials, the regime sought to preserve and reinforce Italian cultural identity, even in distant lands, while disseminating the ideals and values of fascism. In these *Scuole Italiane all'Estero*, present in several countries, textbooks were central instruments to connect the descendants of Italians to the motherland⁵. Far beyond their pedagogical content, these books carried symbolic messages, which exalted the greatness of Italy, glorified its Roman past, and promoted the ideals of obedience, discipline, and nationalism. Thus, the textbook became a cultural mediator⁶ that not only educated, but also shaped identities and reinforced ideological narratives.

Italian schools in Brazil emerged as a response to intense Italian immigration in the late nineteenth and early twentieth centuries, which established significant communities in several Brazilian states with a special emphasis on the states of São Paulo and Rio Grande do Sul⁷. These schools not only met the educational demands of the communities but also reflected a transnational project to strengthen Italianness. It was through these schools that textbooks sent directly from Italy circulated, which brought the cultural and ideological marks of the fascist regime. These books were used to teach not only traditional disciplines, but also to convey nationalist values, exalt the Italian homeland,

³ G. Ciampi, *Le scuole italiane all'estero*, in V. Pellegrini (ed.), *Amministrazione centrale e diplomazia italiana (1919-1943): fonti e problemi*, Roma, Istituto Poligrafico e Zecca dello Stato, 1998, pp. 115-122.

⁴ Barausse, *Os livros escolares como instrumentos para a promoção da identidade nacional italiana no Brasil durante os primeiros anos do fascismo (1922 – 1925)*, cit.

⁵ Id., *Chamas da educação nacional e do sentimento pátrio: as escolas italianas no Rio Grande do Sul da colonização ao final do século 19 (1875-1898)*, «Revista História da Educação», vol. 21, n. 51, 2017, pp. 41-85.

⁶ P. Bourdieu, *A distinção: crítica social do julgamento*, São Paulo, Edusp, 2007; R. Chartier, *A ordem dos livros: leitores, autores e bibliotecas na Europa entre os séculos XIV e XVIII*, Brasília, Editora UNB, 1994; C. Ginzburg, *Miti, emblemi, spie: morfologia e storia*, Torino, Einaudi, 1986.

⁷ Barausse, *Chamas da educação nacional e do sentimento pátrio: as escolas italianas no Rio Grande do Sul da colonização ao final do século 19 (1875-1898)*, cit.; Castro, *A pesquisa histórico-educativa e a imigração italiana: uma revisão dos estudos*, cit.

and shape identities aligned with fascist ideals. The geographical distribution of the schools reflected the concentration of Italian immigrants in rural and urban areas, creating networks for the circulation of teaching materials that connected these communities to Italy⁸.

During the *fascist era*, in Brazil, the use of these books was particularly significant and controversial: at the same time that the Italian government encouraged, produced and sent the textbooks that should circulate in Italian schools in Brazil, the Brazilian government with President Getúlio Vargas, especially during the so-called *Estado Novo* period (1937-1945), imposed significant restrictions on the use of languages other than Portuguese and on the curriculum of these schools, forcing them to adapt or operate informally, in this sense, although it cannot be said that Italian schools were extinct, they, at the very least, needed to reinvent themselves. These school institutions lived on the threshold of these two policies⁹. Thus, although with difficulties, these Italian textbooks had an intense circulation in Brazil and, therefore, were part of the school material culture of these educational institutions, in this scenario this article aims to analyze the Italian textbooks produced during the fascist regime as part of the school material culture, focusing on their covers, exploring their symbols, colors and visual narratives as tools of a transnational political propaganda. This article, therefore, combines a theoretical and empirical approach: theoretically, it explores these materials from the perspective of school material culture and the transnational circulation of fascist ideology, while empirically discussing and exemplifying their characteristics through the detailed analysis of their covers, highlighting visual and symbolic elements that reflect the ideology of the time. In this sense, the analysis of these materials allows not only to understand the educational dynamics of the period, but also to explore how elements of the school material culture contribute to shaping identities and social practices. To this end, the structure of the article is organized into three main sections. The first presents the theoretical bases of school material culture, highlighting authors and fundamental concepts. Next, the typology of Italian textbooks is discussed, with emphasis on their material, symbolic and contextual characteristics. Finally, selected specimens are analyzed to demonstrate how these materials operated in educational practice. Thus, we seek to contribute to a broader understanding of the role of the transnational circulation of school objects in the history of Brazilian and Italian education.

⁸ *Ibid.*

⁹ F. Franchini, *Entre Vargas e Mussolini: A nacionalização do Instituto Médio Ítalo – Brasileiro “Dante Alighieri”*, Master Thesis, School of Education (Supervisor: D. Vidal), São Paulo, Universidade de São Paulo, a.a. 2015.

1. *The school material culture: theoretical bases*

School material culture has been widely studied in the history of education¹⁰, with investigations that analyze objects such as furniture, notebooks, uniforms and textbooks. These studies have contributed significantly to the understanding of how material elements influence pedagogical practices and reflect the social and cultural dynamics of different historical periods. The material elements not only reflect pedagogical practices, but also reveal cultural, political and economic values of an era. Roberto Sani, in preface to the book *Cultura materiale della scuola in prospettiva storica: scritture e possibilità* writes that:

Per giungere poi alla più recente storia della cultura materiale della scuola, che ha posto al centro dell'indagine aspetti e strumenti quali: l'editoria specializzata e i libri di testo, la stampa periodica per gli insegnanti, i quaderni di scuola, le Biblioteche di classe e d'istituto, gli archivi scolastici, i laboratori e gabinetti scientifici, le suppellettili, fino alla strumentazione scientifica, alle carte geografie, ai cartelloni murali e ai numerosi altri ausili e supporti didattici per l'insegnamento¹¹.

Among these artifacts, textbooks occupy precisely a prominent place, as they combine materiality and textual content, configuring themselves as instruments for the transmission of knowledge and, often, for the reinforcement of ideologies. These books not only conveyed pedagogical content but also played a key role in shaping national identities and spreading regime-aligned political values. In addition, their use in Italian schools abroad illustrates how these materials were mobilized in transnational contexts¹², configuring a dy-

¹⁰ A. Choppin, *Les manuels scolaires: Histoire et actualité*, «Revue Française de Pédagogie», vol. 11, n. 2, 1992, pp. 57-72; M. Lawn, I. Grosvenor (edd.), *Materialities of Schooling: Design, Technology, Objects, Routines*, Oxford, Routledge, 2005; A. Escolano, *Materiales para una historia cultural de la escuela*, «Historia de la Educación», vol. 5, n. 2, 2001, pp. 43-61; R. Souza, *Cultura material escolar: A escrita da história da escola e de seus sujeitos*, Campinas, Autores Associados, 2010.

¹¹ R. Sani, *Prefazione all'edizione italiana*, in V. Gaspar, G. Souza, C. Castro (edd.), *Cultura materiale della scuola in prospettiva storica: scritture e possibilità*, São Luís, Editora EDUFMA, 2023, pp. 9.

¹² M. Caruso, *Globalization, Mass Education and Technical Education in Transnational Perspective*, Oxford, Palgrave Macmillan, 2014; J. Droux, R. Hofstetter, *Border-Crossing in Education: Historical Perspectives on Transnational Connections and Circulations*, London, Routledge, 2017; E. Fuchs, *History of Education beyond the Nation? Trends in Historical and Educational Scholarship*, in B. Bacghi, E. Fuchs, K. Rousmaniere (edd.), *Connecting histories of education: transnational and cross-cultural exchanges in (post)colonial education*, New York, Oxford, Berghahn Books, 2014; M. Lawn, *Um conhecimento complexo: o historiador da educação e as circulações transfronteiriças*, «Revista Brasileira de História da Educação», vol. 14, n. 1, 2014, pp. 127-144; G. Ossenbach, M. del Pozo, *Postcolonial models, cultural transfers and transnational perspectives in Latin America: a research agenda*, «Paedagogica Historica», vol. 47, n. 5, 2011, pp. 579-600; T. Popkewitz, *Cosmopolitanism and the Age of School Reform: Science, Education, and Making Society by Making the Child*, New York, Routledge, 2011; D.

dynamic of cultural and educational circulation. In this case, these materials were fundamental instruments in the dissemination of Italian cultural and political values among immigrant communities, playing a strategic role in the construction of Italian national identities abroad.

The school material culture, as a theoretical field, seeks to understand the objects and practices that mediate the relationships between teaching and learning. We can highlight, as a fundamental reference, the studies of Dominique Julia, with the article *La culture scolaire comme objet historique*¹³. Successive studies followed this one, seeking to deepen the historical, cultural and material dimensions that cross school environments in different historical and geographical contexts. School material culture is defined as the set of objects, spaces, texts, images and technologies that constitute the material environment of the school and that play an essential role in the configuration of educational practices and social representations about education¹⁴.

Recently, an economic dimension has been inserted into the elements of school material culture, through which school objects not only mediate pedagogical practices, but also reflect dynamics of production, circulation and consumption that reveal the economic and political structures of an era, factors such as production costs, access to materials and distribution networks influence the materiality of school objects and, consequently, educational practices¹⁵. One of the central aspects of school material culture is its interdisciplinary approach, which combines elements of history, sociology and anthropology to understand how school objects are conceived, used and resignified in different contexts. From this perspective, materiality is not a neutral aspect, but rather loaded with meanings that interact with the pedagogical contents and with the subjects who use them. In the case of textbooks for Italian schools abroad, they not only served educational/school objectives, but also played a propagandist role, reinforcing values such as nationalism, discipline and obedience in Italian communities abroad¹⁶. In addition, the circulation of these books in Italian schools abroad reveals the transnational dimension of school material culture.

The study of textbooks, therefore, goes beyond the analysis of textual content. Researchers highlight the importance of considering textbooks as cultural products that reflect and shape educational practices and social represen-

Vidal (ed.), *Sujeitos e artefatos: territórios de uma história transnacional da educação*, Fino Traço, Belo Horizonte, 2020.

¹³ D. Julia, *La culture scolaire comme objet historique*, «Histoire de l'Éducation», vol. 1, n. 38, 1988, pp. 1-33.

¹⁴ A. Escolano Benito, *Historia ilustrada de la escuela*, Barcelona, Editorial Ariel, 1997.

¹⁵ V. Diana, W. Alcântara, *História econômica da escola: Uma abordagem antropológica em circuito transnacional (1870-1910)*, São Paulo, Unesp, 2024.

¹⁶ Castro, *Livros didáticos italianos, propaganda fascista e a identidade italianidade no exterior: o manual didático I fatti degli italiani e dell'Italia*, cit.

tations¹⁷. This perspective allows a more complex and integrated look at the function of textbooks. By investigating them, it is possible to unveil not only pedagogical practices and educational policies, but also the cultural and social dynamics that influence education. The analysis of textbooks that circulated in Italian schools abroad during the fascist period, in particular, offers valuable subsidies to understand the intersections between education, politics and national identity, highlighting the relevance of these materials for studies on textbooks in authoritarian contexts and the transnational circulation of these ideals.

2. *Textbooks and Italian schools abroad*

The context in which these Italian textbooks circulated in Brazil is intrinsically linked to the intense Italian migratory flow to the country, especially between the end of the 19th century and the first decades of the 20th century. Italian emigration acquired very significant numerical figures: «between 1876 and 1885, more than one million Italians applied for expatriation, more than two million did so in the following decade and more than four million, between 1896 and 1905», between the years 1870 and 1970, approximately 26 million people left Italy¹⁸. The American continent received the most Italian immigrants between 1876 and 1925, with regard to countries, the United States received the most Italians, followed by Argentina and Brazil¹⁹. Italy transferred to Brazil, in less than twenty years, more than one million people²⁰, between the years 1819 and 1947, so the Italian emigration to Brazil was a chapter in the history of emigration in Italy²¹. The process of mass international mobility, which began in the second half of the nineteenth century, involved numerous groups of Italians, this phenomenon arose from the convergence of two distinct dynamics: on the one hand, the Brazilian ruling elites sought alternative solutions to replace slave labor; on the other, sectors of the Italian ruling classes were committed to creating new opportunities for the popular strata, given the socioeconomic backwardness and the crises that

¹⁷ R. Chartier, *A ordem dos livros: leitores, autores e bibliotecas na Europa entre os séculos XIV e XVIII*, Brasília, Editora da UNB, 2017; A. Choppin, *Histoire des manuels scolaires*, Paris, Éditions Retz, 2004.

¹⁸ D. Gabbaccia, *Emigranti: Le diaspora degli italiani dal Medioevo a oggi*, Torino, Einaudi, 2003, p. 68.

¹⁹ C. Emigrazione, *Annuario statistico della emigrazione italiana dal 1876 al 1925*, Roma, L'universale, tipografia Poliglota, 1926.

²⁰ F. Cenni, *Italianos no Brasil: "Andiamo in'Merica"*, São Paulo, Editora da Universidade de São Paulo, 2011.

²¹ E. Franzina, *La terra ritrovata. Storiografia e memoria della prima immigrazione in Brasile*, Genova, Stefano Termanini Editore, 2014.

affected the country²². The Italian emigration, motivated by economic, social and political factors, resulted in a broad diaspora²³ that found in Brazil one of its main destinations. In this scenario, the creation of Italian schools was a central strategy to preserve national identity and promote social cohesion among emigrants, and textbooks played a key role in this process, functioning as a material link between Italians abroad and their homeland. These Italian schools²⁴ were the quintessential places where Italian textbooks circulated. The main reforms began, more consistently, at the end of the nineteenth century, specifically in 1889 with the government of Francesco Crispi and the first law made by him²⁵. Other determinations followed, such as the one prepared by Minister Prinetti in 1901, which created the *Commissariato Generale dell'Emigrazione*²⁶. In the period of Italian fascism, new laws and regulations emerged for Italians outside the homeland and the sending of textbooks to schoolchildren. The most radical and intense measures were precisely at that moment²⁷. In this scenario, textbooks were used to boost the circulation of fascist ideas outside Italy, because: «of course, it would not be possible to conquer youth without fascizing the school world, which was achieved through a rigid control of books [...] and the imposition, from 1930, of single and mandatory texts in primary courses», in this sense, one of the main fascist actions was the sending of new textbooks²⁸, the production of these manuals should comply with some criteria²⁹: «the production of these new texts was adapted to the strategy of the fascist leaders aimed at introducing, in countries with a strong Italian presence, a massive propaganda aimed at producing the 'new Italian' sponsored by fascism [...]»³⁰.

In this scenario, Italian textbooks aimed at Italian schools abroad played

²² Barausse, *Chamas da educação nacional e do sentimento pátrio: as escolas italianas no Rio Grande do Sul da colonização ao final do século 19 (1875-1898)*, cit.

²³ Gabbaccia, *Emigranti: Le diaspore degli italiani dal Medioevo a oggi*, cit.

²⁴ P. Salvetti, *Le scuole italiane all'estero*, in P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana: arrivi*, Roma, Donzelli, 2002, pp. 501-549; G. Floriani, *Scuole italiane all'estero: cento anni di storia*. Roma, Armando Editore, 1974; Ciampi, *Le scuole italiane all'estero*, in V. Pellegrini, (edd.), *Amministrazione centrale e diplomazia italiana (1919-1943): fonti e problemi*, cit. The article published in 2023 by the magazine *História da Educação* shows the distribution of research on Italian schools in Brazil, as well as the authors who conduct them, for this see: Castro, *Pesquisa histórico-educativa e a imigração italiana: uma revisão dos estudos*, cit.

²⁵ Floriani, *Scuole italiane all'estero: cento anni di storia*, Roma, Armando Editore, 1974; Ciampi, *Le scuole italiane all'estero*, cit.

²⁶ M. D'Alessio, *Preparatory courses addressed to «special» teachers for training Italian migrants in the early twentieth century*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 491-508.

²⁷ Ciampi, *Le scuole italiane all'estero*, cit.

²⁸ A. Trento, *Italian Fascism*, São Paulo, Editora Ática, 1982, p. 48.

²⁹ Salvetti, *Le scuole italiane all'estero*, cit.

³⁰ M. Pretelli, *Il fascismo e gli italiani all'estero*, Bologna, Clueb, 2010, pp. 123-138.

a strategic role in maintaining cultural identity and spreading fascist ideology among Italian immigrant communities. The main function of these books was to ensure that Italian children, even living in foreign countries, received an education aligned with the cultural, linguistic and ideological values of the motherland. In addition to offering content such as reading, grammar, history and mathematics, the texts emphasized Italian nationalism, the exaltation of Benito Mussolini's figure and the ideals of fascism, Italian history was presented in a glorified way, highlighting historical figures and events that reinforced Italy's narrative of greatness³¹. At the same time, disciplines such as geography incorporated maps that emphasized the expansionist project of the regime, including colonial territories in Africa. Italian schools abroad served as anchor points to preserve Italianness among immigrant communities³². In this context, textbooks assumed a symbolic dimension: they were at the same time teaching tools and objects, cultural mediators, which connected these communities to the distant homeland.

The materiality of these textbooks deserves to be highlighted, as it not only complements the textual content, but also plays a significant role in the transmission of cultural, ideological and aesthetic values. Many of these books had carefully designed covers, with images that conveyed the values of the fascist regime. Visual elements such as Italian flags, colonial maps, Roman busts and references to the Roman Empire were recurrent, reinforcing the connection between Fascist Italy and its glorious past. In addition, the quality of the paper and graphic design reflected the regime's efforts to project an image of cultural progress and sophistication. The books of the Fascist period sent to Italian schools abroad had, decisively, a higher graphic quality than those sent in the previous period. In the school context, these works can be classified into distinct categories, such as reading books, history manuals, grammars and religious texts, each with specific material and symbolic characteristics. Reading books, for example, played a central role in children's upbringing, combining moralizing stories with patriotic messages. These books often used simple language, accompanied by illustrations that reinforced values such as discipline, work and devotion to the homeland. The use of national symbols, such as the Italian flag and the images of historical figures, was recurrent, highlighting the intention to shape identities aligned with the fascist regime. History manuals, on the other hand, emphasized glorifying narratives of the Italian past, presenting historical events and characters as national heroes. These texts often excluded critical perspectives and were structured to extol Italy's role as a powerful, unified nation. Italian grammars, in turn, were fundamental instru-

³¹ Castro, *Livros didáticos italianos, propaganda fascista e a identidade italiana no exterior: o manual didático I fatti degli italiani e dell'Italia*, cit.

³² T. Luchese, *O processo escolar entre imigrantes italianos no Rio Grande do Sul*, Caxias do Sul, Educs, 2012.

ments for the preservation of the language among Italian communities abroad. In Brazil, for example, Italian grammars were used to reinforce linguistic and cultural ties with Italy, in addition, of course, to teach the formal norm of the Italian language. Religious texts constituted another significant typology, especially in confessional schools. These books combined biblical teachings with political messages, often aligned with the guidelines of the fascist regime. The circulation of these textbooks in Brazil reveals a transnational dimension of this school material culture.

To enter the study of school material culture, this article will use as an example the covers of Italian textbooks produced during the fascist period. The cover, as an element of first interaction with the material, carries symbols, colors, typographies and images that condense political and cultural messages, often serving as a visual summary of the content and intentions of the teaching material. Through them, the covers that students and teachers have the first contact with the textbook, establishing an initial connection that can arouse interest, anticipate the content and transmit symbolic and ideological messages. Several authors have highlighted the relevance of covers in studies of school material culture³³. By studying the covers of textbooks as part of the school material culture, this article seeks to explore the visual and symbolic strategies employed to establish connections between the pedagogical content and the ideological guidelines of the time. The analysis of the typology of Italian textbooks of the fascist period reveals that these materials were not limited to transmitting educational content, but played an active role in the formation of cultural and political identities. Finally, the typology presented also illustrates the complexity and scope of the school material culture, which goes beyond the purely functional usage of objects. The Italian textbooks analyzed in this article offer a clear example of how material, symbolic, and pedagogical elements interact to shape not only national school practices but also broader cultural dynamics. The importance of deepening specific elements that constitute these materials is also highlighted.

³³ A. Escolano Benito, *Historia ilustrada de la escuela*, Barcelona, Editorial Ariel, 2001. A. Viñao Frago, *Os espaços e os tempos escolares: materialidade, representações e práticas*, «Educação em Revista», vol. 24, n. 3, 2008, pp. 15-34; R. Chartier, *The Order of Books: Readers, Authors, and Libraries in Europe Between the Fourteenth and Eighteenth Centuries*, Stanford, Stanford University Press, 1994; L. Pazzaglia, *L'editoria scolastica e la propaganda fascista: le copertine dei libri di testo come strumento ideologico*, Milano, Vita & Pensiero, 2003, pp. 125-145.

3. *The covers of fascist textbooks: ideology and aesthetics*

The textbooks which circulated in Italian schools abroad have already been the subject of some analysis in the context of the history of Italian and Brazilian education³⁴. However, the perspective of school material culture, which focuses on objects as historical and educational testimonies, is still little applied to this category of books. For this article, we specifically chose a close look at the covers of textbooks, which play a central role in the visual and symbolic communication of materials, in view of their potential, as they were certainly made to pass on the ideas that the regime understood as important to be disseminated in Italian communities abroad.

It is certainly not possible here to analyze all the covers of all the Italian textbooks that this project studies. First, we opted for those titles that had a circulation in Brazil, then we proceeded in a way that covered a diverse typology, such as history books, reading books, literature, religion, science, geography books.

We also sought to contemplate several years *within the fascist ventennio*, as well as to study book covers from different publishers, diverse authors and primary school years. The covers of these books visually reinforced the values and narratives conveyed by the texts, the presence of Italian national symbols, such as the flag, fasces and historical figures, contrasted with the absence of explicit references to the Brazilian context, reinforcing the idea of exclusive belonging to the motherland.

Textbooks are understood as cultural artifacts that reflect the power dynamics and ideological intentions of an era³⁵. In the context of Italian schools in Brazil, these works take on a particular meaning: for children born on Brazilian territory but descended from Italians, these covers loaded with Italian symbologies had a deep and sometimes ambivalent meaning: on the one hand, they functioned as a powerful link with the homeland of their parents and grandparents, reinforcing the cultural and emotional connection with Italy, on the other hand, these covers also served as a tool for building identity in a context in which these children were immersed in a diverse Brazilian culture and often distant from Italian values and traditions. For them, these graphic representations acted as a symbolic bridge between the family past and the present lived in Brazil, establishing a space for identity negotiation. This visual

³⁴ Escolano, *Historia ilustrada de la escuela*, cit.; Viñao Frago, *Os espaços e os tempos escolares: materialidade, representações e práticas*, cit.; C. Bittencourt, *Livro didático e saber escolar*, cit.; Chartier, *A ordem dos livros: leitores, autores e bibliotecas na Europa Moderna*, cit.; A. Escolano, A. Viñao Frago, *Las culturas de la enseñanza: tradiciones escolares y cultura material*, Madrid, Morata, 2005; M. Hilsdorf, *Livro didático: história e memória*, São Paulo, Edições Loyola, 2004.

³⁵ A. Escolano, *La cultura material de la escuela: espacio, texto e imagen*, Madrid, Editorial Laertes, 1997.

bridge not only reaffirmed Italy's cultural heritage but also introduced the ideals and values of the fascist regime subtly and effectively, shaping perceptions of patriotism and social hierarchy.

Moreover, for many of these children, who had possibly never visited Italy, the images and symbols on the covers of textbooks offered an idealized and romanticized view of what it meant to be Italian. This created a sense of Italianness³⁶ shaped not only by family narratives but also by the interests of the fascist regime, which sought to consolidate its ideological influence even beyond Italy's borders³⁷. Thus, these covers were not just graphic representations; they carried significant symbolic and political weight, shaping both cultural identity and children's perceptions of their place in the world.

In this context, the selection of the specimens analyzed for this contribution reflects this symbolic richness. The table below lists the 10 copies selected for this contribution:

Table 1. List of Italian textbooks that circulated in Italian schools abroad

Scuole Italiane all'estero (ed.). <i>Sole d'Italia: letture classe 5</i> , Verona, A. Mondadori, 1932
C. Bagagli, <i>Letture prima classe</i> . Roma, Libreria dello Stato, 1929
Scuole Italiane all'estero (ed.). <i>Aritmetica e scienze per la 4. classe elementare</i> , Verona, A. Mondadori, 1935
Scuole Italiane all'estero (ed.). <i>Storia e geografia per la 4. classe elementare</i> , Verona, A. Mondadori, 1938.
G. Fanciulli, <i>Letture di religione (per le scuole elementari all'estero)</i> , vol. 1., per le classe 2. and 3, Verona, A. Mondadori, 1935.
G. Fanciulli, <i>Glorie D'Italia: Libro per la gioventù italiana sotto ogni Cielo</i> , Torino, Società Editrice Internazionale, 1929.
G. Fanciulli, <i>Alza Bandiera!</i> , Firenze, Casa Editrice Marzocco, 1939.
V. Gaiba, N. Oddi, <i>Il libro della prima classe</i> , Bergamo, La Libreria dello Stato, 1940.
O. Ginesi, <i>Patria lontana! Patria Diletta!</i> , Milano, Casa Editrice Cartoccino Monza, 1929.
Volpe, Gioacchino, <i>Il Risorgimento dell'Italia</i> , Roma, Arti Grafiche Alfieri and Lacroix, 1934.

The textbooks analyzed in this study were found in four important collections that stand out as fundamental references for research on textbooks and school material culture. The first is the *Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia* (Cesco), lo-

³⁶ O. Truzzi, *Italianidade no interior paulista: percursos e descaminhos de uma identidade étnica (1880 – 1950)*, São Paulo, UNESP, 2016.

³⁷ J. Bertonha, *Entre Mussolini e Plínio Salgado: o fascismo italiano, o integralismo e o problema dos descendentes de italianos no Brasil*, «Revista Brasileira de História», vol. 21, n. 40, 2011, pp. 57-71.

cated at the Università degli Studi di Macerata. The second is the *Museo della Scuola e dell'Educazione "Mauro Laeng"* (MuSEd), of the Università degli Studi di Roma Tre. Additionally, the *Biblioteca Nazionale Centrale Firenze* and the *Centro de Memória do Colégio Dante Alighieri* in São Paulo, Brazil, also hold relevant collections that were consulted for this research. These archives provide not only access to highly relevant primary sources but also an academic context that favors the critical and interdisciplinary analysis of materials, significantly contributing to the advancement of research on textbooks, especially in the fascist period.

The books chosen cover a variety of school subjects, such as reading, mathematics, science, history, geography and religion, demonstrating the fascist regime's systematic effort to structure an integral education that incorporated technical and humanistic content aligned with nationalist ideology. Publications such as those of Giuseppe Fanciulli (*Glorie d'Italia* and *Alza Bandiera!*)³⁸ and Clementina Bagagli (*Lecture* series for several series)³⁹ and Gioacchino Volpe (*Il Risorgimento italiano*)⁴⁰ illustrate the importance of renowned authors in the composition of this educational and political project. In addition, the years of publication of the works, ranging from 1929 to 1940, allow us to observe the changes and adaptations in content and visual messages throughout the fascist period.

Visually, the covers represent a rich field of study for their graphic diversity, from realistic and colorful illustrations, as in *Il libro della prima classe*⁴¹, to geometric and modernist compositions, as in *Aritmetica and scienze per la 4. classe elementare*⁴².

The inclusion of symbolic elements, such as the eagle, the fascio littorio, the Italian flag and historical figures, underscores the ideological dimension of these publications. The covers were not merely decorative; they played an active role in building a collective imaginary that exalted Italy's glorious past and promoted the values of fascism. This visual richness allows us to investigate how symbols and colors were mobilized to reinforce cultural and political identities. The selection also sought to contemplate the multiplicity of contexts in which these books were produced and used. Included are works intended for early and advanced series, published by prestigious publishers such as A. Mondadori, R. Bemporad & Figlio Editore and Società Editrice Internazionale. These materials highlight the complexity of the fascist educational project, which went beyond the classroom, seeking to shape the behavior and mentality of new generations of Italians abroad. Thus, the analysis of these covers

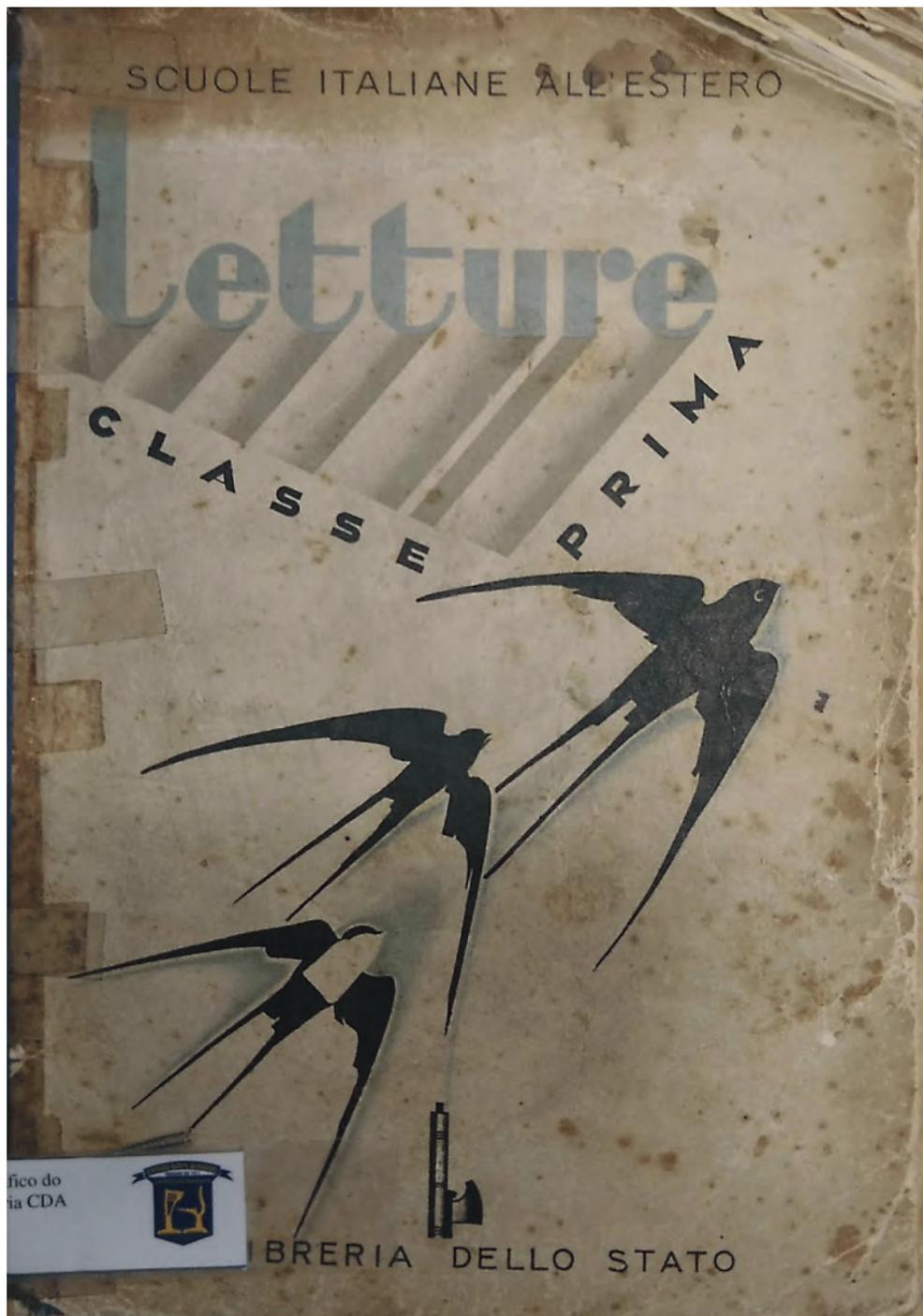
³⁸ G. Fanciulli, *Alza Bandiera!*, Firenze, Casa Editrice Marzocco, 1939.

³⁹ C. Bagagli, *Lecture prima classe*, Roma, Libreria dello Stato, 1929.

⁴⁰ G. Volpe, *Il Risorgimento dell'Italia*, Roma, Arti Grafiche Alfieri and Lacroix, 1934.

⁴¹ V. Gaiba, N. Oddi, *Il libro della prima classe*, Bergamo, La Libreria dello Stato, 1940.

⁴² Scuole Italiane all'estero (ed.). *Aritmetica e scienze per la 4. classe elementare*, Verona, A. Mondadori, 1935.



Pic. 1. Cover of the book by C. Bagagli, *Letture Classe Prima*, 1929 (Centro de Memória, Colégio Dante Alighieri, São Paulo)



Pic. 2. Cover of the book by Scuole italiane all'estero, *Aritmetica e Scienze per la IV Classe Elementare*, 1935 (Museo della Scuola e dell'Educazione "Mauro Laeng", Università degli Studi di Roma Tre)

not only enriches the study of school material culture, but also enlightens on the role of textbooks as multifaceted instruments of cultural and ideological propaganda.

The educational materials analyzed, published between 1929 and 1940, represent a forceful expression of the cultural policy of the Italian fascist regime, especially in relation to Italian communities abroad. The integration between education and political advertising is evident both in the topics covered and in the graphic elements present on the covers and illustrations.

The titles analyzed cover a variety of disciplines, including reading, history, geography, mathematics, science, and religion. Among the most striking examples are *sole d'Italia: letture classe V* (1932)⁴³, which celebrates the Italian nation through literary and historical texts and *Letture di religione* (1935)⁴⁴, by Giuseppe Fanciulli, which combines religious doctrine with elements of exaltation of the fascist regime. History and geography also played a key role in constructing a narrative that legitimized the fascist regime and reinforced the idea of Italian cultural superiority.

Books such as *Storia e Geografia per la IV Classe Elementare* (1938)⁴⁵ and *Il Risorgimento dell'Italia* (1934)⁴⁶ present a glorified view of the Italian past, connecting the historical achievements of the Roman era to the imperialist project of fascism. In these works, maps, images of monuments and heroic narratives converge to exalt the greatness of the nation, and the civilizing mission attributed to Italy. Another aspect worth noting is the aesthetic character of these materials.

The covers and illustrations are full of fascist symbology, including fasces, eagles, flags and images that recall the unity and strength of the Italian people. For example, the cover of *Alza Bandiera!* (1940)⁴⁷, also by Giuseppe Fanciulli, uses vibrant colors and heraldic elements to evoke feelings of patriotism and devotion to the homeland. *Il Libro della Prima Classe* (1940)⁴⁸ portrays children reading under a flowering tree, next to an Italian flag, suggesting a harmonious relationship between childhood and national values.

These materials also reflect the regime's efforts to consolidate a unique and homogeneous identity among Italians living abroad. The dissemination of textbooks such as *Glorie d'Italia* (1929)⁴⁹ and *Patria lontana! Patria Diletta!*

⁴³ Scuole Italiane all'estero (ed.), *Sole d'Italia: letture classe 5*, Verona, A. Mondadori, 1932.

⁴⁴ G. Fanciulli, *Letture di religione (per le scuole elementari all'estero)*, vol. 1., per le classi 2. e 3., Verona, A. Mondadori, 1935.

⁴⁵ Scuole Italiane all'estero (ed.), *Storia e geografia per la 4. classe elementare*, Verona, A. Mondadori, 1938.

⁴⁶ Gioacchino, *Il Risorgimento dell'Italia*, cit.

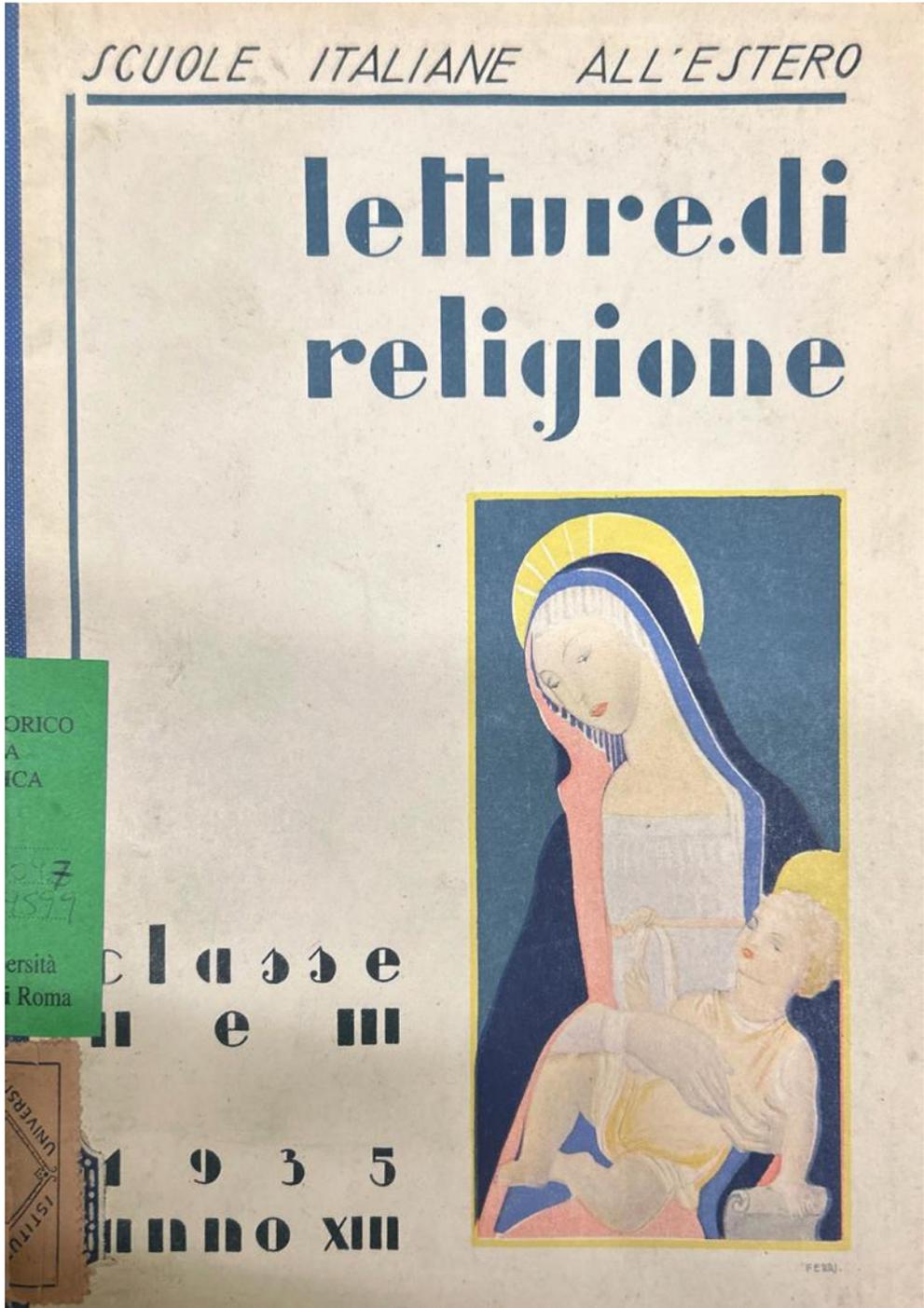
⁴⁷ Fanciulli, *Alza Bandiera!*, cit.

⁴⁸ Gaiba, Oddi, *Il libro della prima classe*, cit.

⁴⁹ G. Fanciulli, *Glorie D'Italia: Libro per la gioventù italiana sotto ogni Cielo*, Torino, Società Editrice Internazionale, 1929.



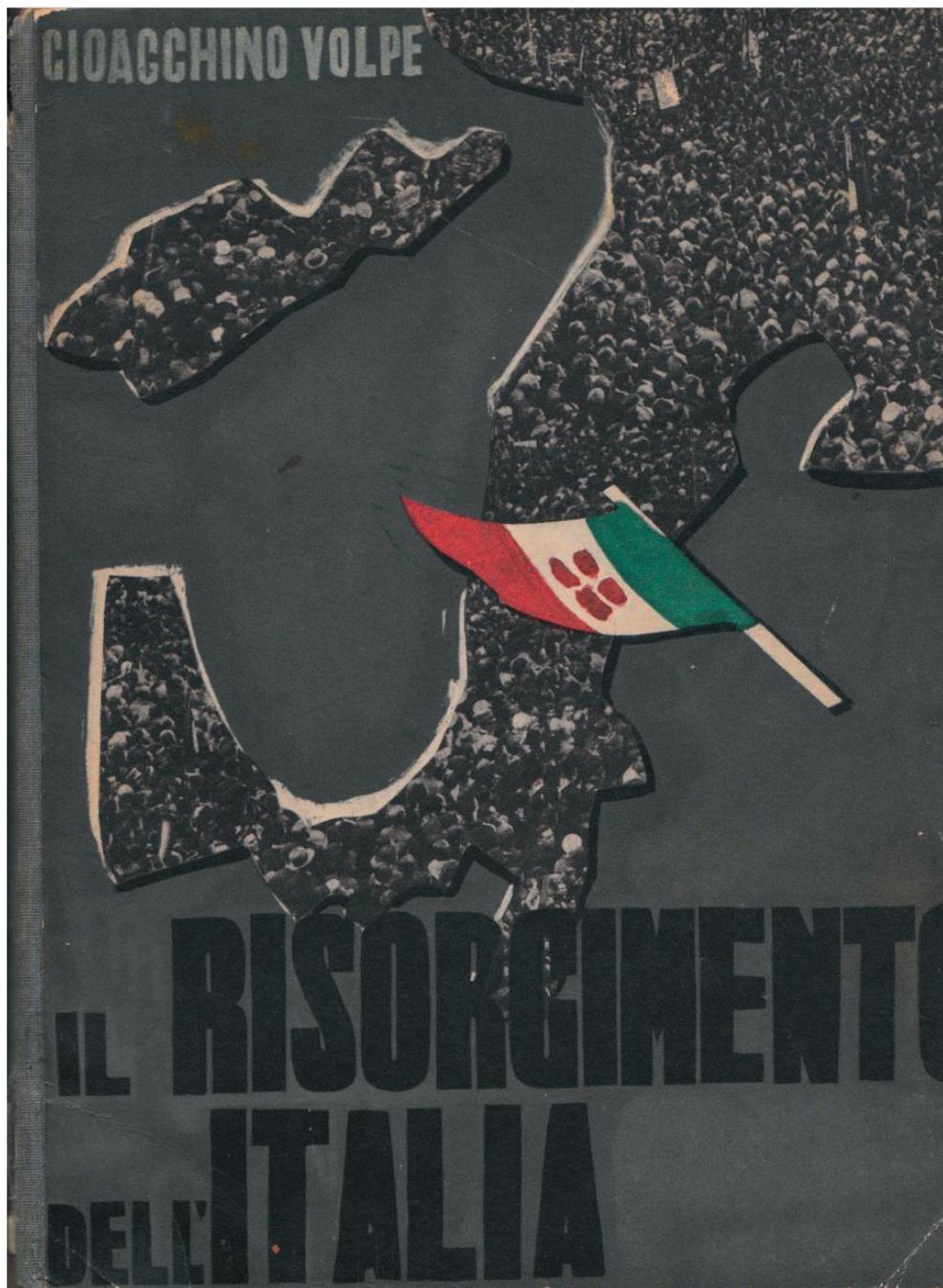
Pic. 3. Cover of the book by Scuole italiane all'estero, *Sole d'Italia. Letture per la Classe V*, 1932. (Museo della Scuola e dell'Educazione "Mauro Laeng", Università degli Studi di Roma Tre)



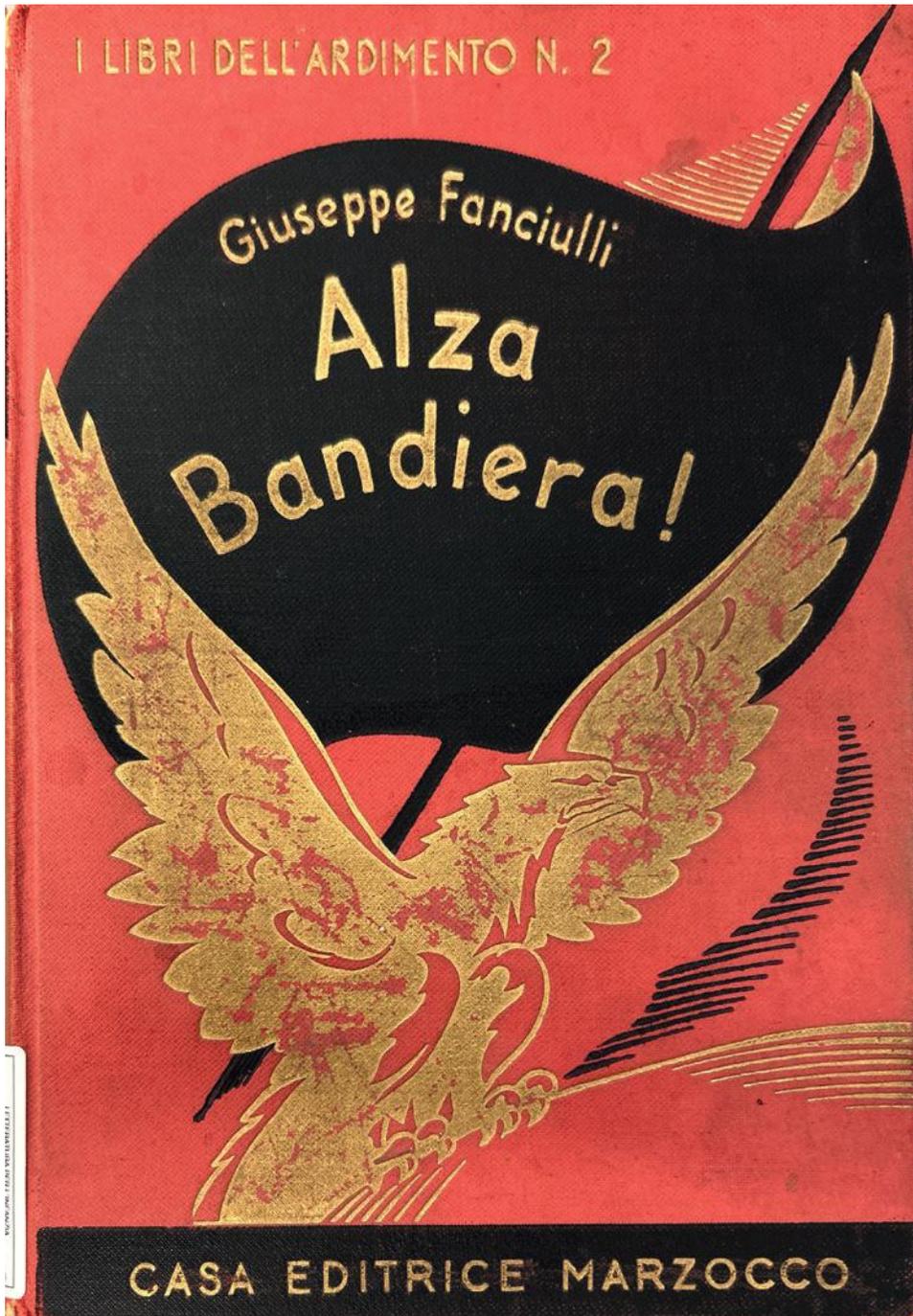
Pic. 4. Cover of the book by G. Fanciulli, *Lecture di religione*, 1935 (Museo della Scuola e dell'Educazione "Mauro Laeng", Università degli Studi di Roma Tre)



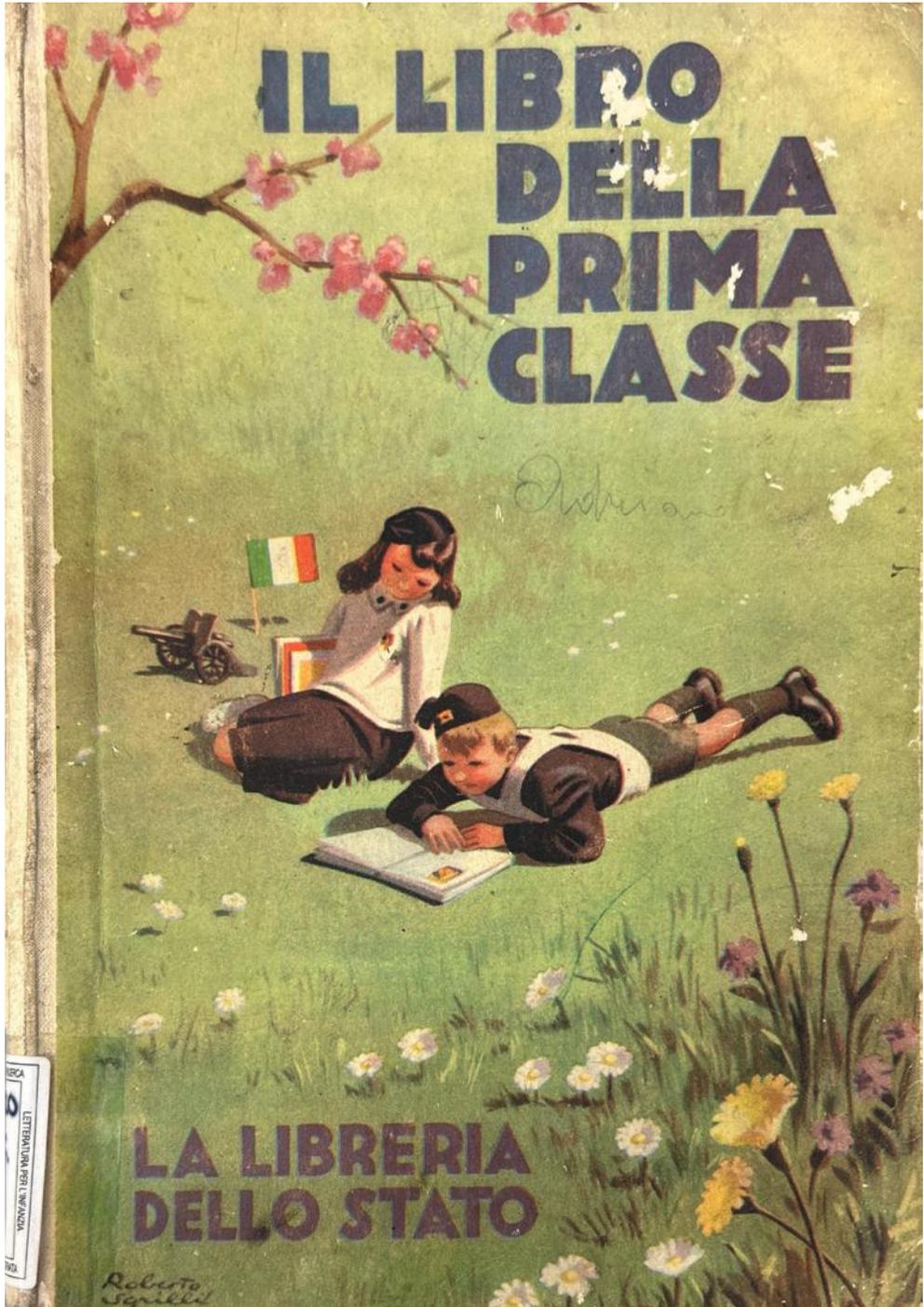
Pic. 5. Cover of the book by Scuole italiane all'estero, *Storia e Geografia per la IV Classe Elementare*, 1938 (Museo della Scuola e dell'Educazione "Mauro Laeng", Università degli Studi di Roma Tre)



Pic. 6. Cover of the book by, G. Volpe, *Il Risorgimento dell'Italia*, 1934 (Biblioteca Nazionale Centrale Firenze)



Pic. 7. Cover of the book by G. Fanciulli, *Alza Bandiera!*, 1939 (Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia, Università degli Studi di Macerata)



Pic. 8. Cover of the book by V. Gaiba and N. Oddi, *Il Libro della Prima Classe*, 1940 (Museo della Scuola e dell'educazione "Mauro Laeng", Università degli Studi di Roma Tre)

(1929)⁵⁰ reinforced the cultural and emotional connection with Italy, even in distant lands. The themes addressed, often loaded with symbolism, sought to build a sense of belonging and loyalty to the fascist regime, while promoting the use of the Italian language as a unifying element.

The covers of Italian textbooks intended for schools abroad feature a strong presence of national symbols, designed to reinforce Italian cultural identity among students. Elements such as the Capitoline Wolf, often depicted with Romulus and Remus, evoke the mythical foundation of Rome, connecting children to Italy's ancestral history. The Italian flag also emerges as a constant symbol, representing patriotism and the unbreakable bond with the motherland. In addition, the *fascio littorio*, discreetly inserted in some covers, reflects the ideological influence of the fascist regime, marking the time when these didactic materials circulated and projecting the values promoted by the State.

Another aspect evident in the covers is the emphasis on modernity and progress, translated by representations of airplanes, metal towers and geometric grids. These visual elements symbolize technical-scientific advancement and dynamism, associating Italy with a modern and constantly developing nation. This aesthetic not only conveys a message of innovation, but also reinforces the role of the state in driving modernity and positioning Italy on the global stage. The contrast between classic and modern, present in the fusion of traditional architectural elements such as columns and porticoes with icons of technology and science, creates a visual narrative that balances tradition and progress, reaffirming Italian cultural identity.

In addition, many covers feature bucolic scenes that represent childhood as an idealized period of purity and serenity. The illustrations, which show children in school uniforms surrounded by flowers and lawns, highlight the connection with nature and recall the simplicity of everyday life. This visual choice suggests that the formation of future generations must be anchored not only in knowledge, but also in the interaction with nature. Children, often portrayed reading or studying, reinforce the centrality of textbooks in the educational process.

The graphic aesthetics of the covers also play a crucial role in visual communication. The use of clean lines, geometric fonts and a carefully selected color palette, often dominated by red, green and white, establishes a nationalist visual identity that dialogues directly with the colors of the Italian flag. This choice creates an immediate visual link with Italy, while the contrasts between light and dark tones give depth and prominence to the main elements. This cohesive visual approach reflects the modernist tendencies of the time, aligning with the aesthetic guidelines of the fascist regime.

Religion also occupies a central place on the covers, with stylized depic-

⁵⁰ O. Ginesi, *Patria lontana! Patria Diletta!*, Milano, Casa Editrice Cartoccino Monza, 1929.



Pic. 9. Cover of the book by G. Fanciulli, *Glorie d'Italia*, 1929 (Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia, Università degli Studi di Macerata)



Pic. 10. Cover of the book by O. Ginesi, *Patria lontana! Patria diletta!*, 1929 (Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia, Università degli Studi di Macerata)

tions of Christian figures such as Mary and the Child Jesus conveying a message of faith and spirituality. These images reinforce morality and Christian values as pillars of Italian children's upbringing, connecting national identity to religion. The presence of crosses and other Christian symbols, although discreet, underscores the role of religion in legitimizing the cultural identity promoted by the fascist regime.

Finally, covers often highlight the geographic and global dimension of textbooks, using terrestrial globes, stylized maps, and maritime elements to reinforce the idea of Italian cultural expansion. These representations not only connect students to the world through geography, but also symbolize the reach of Italian schools abroad, positioning Italy as an influential cultural center that transcends its borders.

In considering these visual and symbolic aspects, the covers of Italian textbooks go beyond mere aesthetic elements: they become ideological and pedagogical instruments that articulate the relationship between culture, national identity and education. These characteristics reinforce the relevance of these materials in the analysis of school material culture, providing a broader understanding of the context in which they were produced and used. These elements reflect the pedagogical and ideological intention of the covers, which aim not only to attract the eye, but also to convey subliminal messages of cultural identity, moral values and loyalty to the homeland. The uniformity of these elements demonstrates the coordinated effort to align education with the political-cultural project of fascism, especially in contexts of emigration.

The selected books therefore represent much more than simple pedagogical tools. They are historical testimonies of a time when education was instrumentalized to serve political and ideological goals. By exploring these materials, it is possible to understand how the fascist regime used school and textbooks as vehicles for propaganda and how these elements contributed to shaping the educational experience of Italian communities abroad.

Some Last Considerations

This article aimed to analyze the Italian textbooks produced during the fascist regime for circulation in Italian schools abroad, with special attention to the titles circulated in Brazil. Through an approach that combined theory and empirical analysis, we explored how these materials not only fulfilled their pedagogical function, but also served as ideological propaganda tools, highlighting their covers as central elements of school material culture. By connecting the visual and symbolic characteristics of these books to the historical and political context of the time, the study revealed the relevance of these textbooks as mediators between fascist ideals and educational practices

in overseas contexts. The importance of this research lies in the expansion of discussions on school material culture, by introducing the analysis of covers as an aspect hitherto little explored in studies on Italian textbooks abroad.

The analysis of Italian textbooks of the fascist period, especially through their covers, revealed a complex intertwining between materiality, pedagogy and ideology. These materials were not merely educational instruments, but also acted as vehicles for political propaganda, reflecting the values and ambitions of the fascist regime both in Italy's internal context and in its diaspora. Through colors, symbols, figures and graphic compositions, textbook covers conveyed messages carefully designed to shape children's perceptions and reinforce Italian cultural and political identity.

Fascism used education as one of its main tools for building a society aligned with its ideals. Textbooks, along with other instruments of school material culture, played a key role in this project. The covers analyzed in this article illustrate how the visual materiality of these objects was mobilized to engage young students in narratives of patriotism, discipline and devotion to the homeland. The aesthetics of many of these covers, which ranged between geometric modernism and classical iconography, reflected the contradictions and ambitions of the regime, which simultaneously sought to project an image of modernity and legitimize itself through its connection with the glorious past of Ancient Rome.

The thematic and visual diversity of the covers – covering subjects such as history, geography, reading, religion and science – also highlighted the amplitude of the regime's educational strategies. When considering the books intended for the *Scuole Italiane all'Estero*, it is possible to realize how these materials also played a strategic role in maintaining cultural and political ties between Italian communities abroad and the homeland. The covers, with their images of national flags, maps and symbols, reinforced the idea of belonging and identity, even in distant geographical contexts. The idealization of the motherland as a protective and guiding figure is present in several covers that show the regime's effort to preserve Italianity among the descendants of immigrants. In addition, the study of textbook covers as part of school material culture revealed the importance of considering the materiality of these objects in a broader perspective. The covers not only reflected the ideological intentions of the regime, but also worked as cultural mediators between textual content and users. The interaction between teachers, students, and books was undoubtedly influenced by these visual choices, which shaped educational perceptions and experiences in the fascist period. By approaching these covers from the perspective of school material culture, it was possible to broaden the understanding of how seemingly simple objects can carry complex and multifaceted meanings. The focus on materiality also opens the way for future researches that can investigate other aspects of textbooks, such as their internal illustrations, typographic choices or even the editorial processes that

influenced their production. When addressing the relationship between school culture and Italian textbooks in Brazil, it is evident that these materials were more than simple pedagogical instruments. They were part of a larger political-cultural project, in which education was used as a tool to shape identities and strengthen transnational ties. This analysis reinforces the importance of considering school culture as a dynamic and multifaceted field, in which material objects, pedagogical practices and historical contexts intertwine to produce meanings and influence generations. The study of the relationship between school culture and Italian textbooks in Brazil reaffirms the importance of understanding education as a field of cultural and political disputes. In the Brazilian case, Italian textbooks stand out as concrete examples of how school material culture can be mobilized to strengthen transnational identities and promote ideological values, while dialoguing with local contexts marked by cultural and political tensions. Finally, the analysis presented here reinforces the need to study education as a field that transcends formal teaching and includes the interactions between objects, subjects and ideologies. The Italian textbooks of the fascist period, as cultural products, are concrete examples of how education can be mobilized to serve broad and ambitious political projects. By examining their covers, we were able to access not only the aesthetics and values of the regime, but also the strategies of power that have shaped entire generations, both within Italy and beyond its borders.

Storiche dell'arte nella prima metà del Novecento. Un approccio prosopografico*

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Women Art Historians in the First Half of the Twentieth Century. A Prosopographic Approach

ABSTRACT: On the basis of an essentially prosopographical approach and with the help of the correspondence between Adolfo Venturi, holder from 1901 of the first chair of art history established in Italian universities, and some of his numerous students at the University of Rome “La Sapienza”, as well as the documentation relating to the *Postgraduate School in Medieval and Modern Art History* established in 1901 at the Faculty of Humanities at the same university, the authors aim to illuminate the characteristics and modalities of the gradual rise, in the period between the two world wars, of the first generation of art historians engaged in various capacities in studies and research in the sector, in school and university teaching and in the administration and management of antiquities and fine arts.

EET/TEE KEYWORDS: History of Education; History of Art; Correspondence Adolfo Venturi; Specialization School in Medieval and Modern Art History; Italy; XX Century.

* Il presente lavoro ripropone, in una versione ampliata e annotata, il testo della relazione presentata dai due autori, con il titolo «*Tributi femminili alla Storia dell'Arte*». *Le allieve di Adolfo Venturi tra ricerca, scuola e amministrazione delle Antichità e Belle Arti*, al seminario internazionale «*Voces femeninas para una historia del arte militante: relatos y memoria*», promosso dal Departament d'Història i Història de l'Art de l'Universitat Rovira i Virgili de Tarragona (Espanya), Tarragona 18-19 dicembre 2024.

Introduzione

In una lettera inviata nel gennaio del 1939 al suo antico maestro Adolfo Venturi, la storica dell'arte Giulia Sinibaldi riferiva il contenuto di un recente colloquio avuto con la collega Mary Pittaluga, anch'essa formatasi alla scuola dell'anziano studioso modenese: «Giorni fa – ella scriveva – ne parlavamo la Mary ed io. Si diceva: perché mai quasi non esistono storiche della letteratura, greciste, latiniste, ed esistono invece parecchie storiche delle arti figurative? Fu facile rispondere! Perché esiste un solo Adolfo Venturi»¹.

Il nesso stabilito nella lettera della Sinibaldi tra il magistero universitario di Adolfo Venturi e la comparsa in Italia di una cospicua rappresentanza di «storiche delle arti figurative» non era affatto privo di fondamento o ispirato solamente da un sentimento di stima e di gratitudine nei confronti dell'illustre maestro.

Già alcuni anni prima, del resto, un'altra brillante studiosa formatasi alla 'scuola' di Venturi, Paola Della Pergola, non aveva mancato di sottolineare che, se l'insegnamento della storia dell'arte era stato introdotto con successo nei Licei dalla riforma Gentile del 1923² ciò era dovuto soprattutto alle giovani allieve di Venturi, ovvero alle numerose «donne uscite dalla Sua scuola per lo più, che sono entrate [ad insegnare la storia dell'arte nei Licei] al posto di dilettanti i quali pensavano solo a riscuotere lo stipendio e non si curavano né dell'insegnamento né della disciplina»³.

Lo stesso Adolfo Venturi, nel ripercorrere, in una conferenza tenuta nel 1938, i significativi mutamenti registrati nella facoltà di Lettere della Sapienza di Roma a partire dalla Prima guerra mondiale, forniva una lucida ed efficace testimonianza dell'avvento nelle aule universitarie di una presenza femminile dalle dimensioni cospicue, i cui interessi di studio e di ricerca si sarebbero in misura crescente orientati verso il settore storico-artistico. Negli anni della Prima guerra mondiale, ricordava lo studioso, «la Facoltà di lettere nell'Università era gremita delle figlie, delle sorelle, delle compagne dei tanti che dalle trincee, dal mare, dalle alte regioni dell'aria, si battevano per la madre Italia. Finì la guerra [...], ma l'Università nella facoltà letteraria non mutò aspetto. [...] Tennero dunque le donne il campo delle lettere. [...] Di questo testimonio con fede io, professore di Storia dell'Arte, che le ho vedute, attente, studiare

¹ Giulia Sinibaldi a Adolfo Venturi, Firenze 31 gennaio 1939, in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, Cart-XXXI,2474 – *Sinibaldi, Giulia* (27 ottobre 1924-3 marzo 1941), VT S2 b058,28.

² Cfr. R. Sani, *La Storia dell'Arte come disciplina scolastica. Dal primo Novecento al secondo dopoguerra*, Macerata, eum, 2022; e S.A. Meyer, *Cenerentola a scuola. Il dibattito sull'insegnamento della storia dell'arte nei licei (1900-1943)*, Macerata, eum, 2023.

³ Paola Della Pergola a Adolfo Venturi, Roma 21 maggio 1935, in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, Cart-XXXI, 2474 – *Della Pergola, Paola* (27 ottobre 1924-3 marzo 1941), VT S2 b058,28.

questo grande museo secolare che è Roma, questa nostra Italia popolata di genii, e, fuori d'Italia, le nostre opere d'arte, pezzi di patria lontani. [...] Così tante giovani studiose uscirono dal corso universitario di perfezionamento, abili, pronte al lavoro»⁴.

1. *La Scuola di perfezionamento in storia dell'arte medioevale e moderna dell'Università di Roma e l'avvento della prima generazione di storiche dell'arte in Italia*

Per cogliere appieno il significato e le implicazioni della ricostruzione proposta da Adolfo Venturi occorre ricordare che, nello stesso anno in cui lo studioso modenese diveniva titolare all'Università di Roma della prima cattedra di storia dell'arte⁵, con il R.D. 9 giugno 1901, n. 349⁶ – che costituiva una sorta di sviluppo e completamento del precedente R.D. 23 luglio 1896, n. 413 con il quale erano state istituite una serie di borse di studio espressamente destinate al perfezionamento negli studi storico-artistici⁷ – era stata fondata, presso la stessa facoltà di Lettere della Sapienza, la *Scuola di perfezionamento in storia dell'arte medioevale e moderna*⁸, alla cui originaria finalità «di preparare per

⁴ A. Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, Roma, Palombi, 1939, pp. 1-3.

⁵ Cfr. 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.), *Archivio di Adolfo Venturi. 4. Incontri Venturiani: 22 gennaio, 11 giugno 1991*, Pisa, Scuola Normale Superiore, 1995, pp. 41-99; e Id., *Adolfo Venturi e l'università italiana fra Ottocento e Novecento: dal carteggio presso la Scuola Normale Superiore di Pisa*, in M. D'Onofrio (ed.), *Adolfo Venturi e la Storia dell'arte oggi*, Modena, Franco Cosimo Panini, 2008, pp. 83-89.

⁶ R.D. 9 giugno 1901, n. 349 – *che riordina gli studi di perfezionamento nella storia dell'arte medioevale e moderna presso la Facoltà di lettere e filosofia nella R. Università di Roma*, in <<https://patrimonio.archivio.senato.it/inventario/archivio-centrale-dello-stato/raccolta-ufficiale-leggi-e-decreti>> (ultimo accesso: 20.12.2024).

⁷ R.D. 23 luglio 1896, n. 413 – *che istituisce presso la Facoltà di lettere e filosofia nella R. Università di Roma alcune borse per il perfezionamento degli studi dell'arte medioevale e moderna*, in <<https://patrimonio.archivio.senato.it/inventario/archivio-centrale-dello-stato/raccolta-ufficiale-leggi-e-decreti>> (ultimo accesso: 20.12.2024).

⁸ Sulle origini e i primi sviluppi della *Scuola di perfezionamento in storia dell'arte medioevale e moderna* dell'Università di Roma si vedano: S. Valeri, *Adolfo Venturi all'Università di Roma. Regesti e annotazioni sui primi anni di vita della scuola venturiana (1890-1931)*, in G. Agosti (ed.), *Archivio di Adolfo Venturi. 4. Incontri Venturiani: 22 gennaio, 11 giugno 1991*, cit., pp. 101-127; Id., *Il «Perfezionamento in storia dell'arte medioevale e moderna»*. Regesti e documenti, in Id. (ed.), *Adolfo Venturi e l'insegnamento della storia dell'arte, atti del Convegno (Roma, 14-15 dicembre 1922)*, Roma, Lithos, 1996, pp. 119-125; S. Rossi, *La Scuola di Storia dell'Arte*, in *Le grandi scuole della Facoltà, Atti del Convegno tenuto nel 1994*, Roma, Università degli Studi "La Sapienza" - Facoltà di Lettere e Filosofia, 1996, pp. 337-381; e L. Lorzio, A.

le gallerie nazionali ufficiali colti ed esperti»⁹, assai presto si sarebbe aggiunta quella di formare «una classe di insegnanti», fornendo loro «l'abilitazione all'insegnamento della storia dell'arte nelle scuole secondarie»¹⁰.

Diretta fin dalle origini dallo stesso Venturi e riordinata di lì a poco con il R.D. 16 febbraio 1905, n. 40, il quale prolungava il corso di studi *post lauream* da due a tre anni¹¹, la *Scuola di perfezionamento in storia dell'arte medioevale e moderna* sarebbe divenuta il principale e più ambito seminario di formazione specialistica e di ricerca per quanti aspiravano ad intraprendere le carriere professionali in ambito storico-artistico¹². E, per ciò che qui interessa, il vero e proprio laboratorio all'interno del quale si sarebbe formata la prima generazione di studiose di storia dell'arte, destinate in larga parte ad esercitare un ruolo di primaria importanza, durante il ventennio fascista e poi negli anni del secondo dopoguerra, tanto nell'amministrazione e tutela delle antichità e belle arti quanto nell'insegnamento scolastico e universitario, nonché ad animare in misura crescente e con sempre maggiore autorevolezza il dibattito storico-artistico nella penisola.

I dati relativi agli iscritti alla *Scuola di perfezionamento in storia dell'arte medioevale e moderna* dell'Università di Roma mostrano come, fin dalle origini, la componente femminile sia stata prevalente, e come essa sia ulteriormente cresciuta in seguito, al punto da raggiungere un numero quasi doppio rispetto a quella maschile. Se infatti nel primo periodo, tra il 1904 e il 1925, le donne ammesse a frequentare la *Scuola* furono in tutto 35, a fronte dei 28 iscritti di sesso maschile, negli anni compresi tra il 1925-1926 e il 1940-1941 tra coloro che frequentarono il corso di perfezionamento *post lauream* le donne furono complessivamente ben 141, contro i 75 iscritti maschi¹³.

A conferma dell'importanza avuta da Adolfo Venturi nell'orientare verso gli studi storico-artistici tante giovani studiose basterà segnalare come, fino al suo pensionamento nel 1931, circa il 75% delle iscritte alla *Scuola di perfezionamento in storia dell'arte medioevale e moderna* si sia laureata in Let-

Amendola, *Vedere e rivedere e potendo godere. Allievi di Adolfo Venturi in viaggio tra l'Italia e l'Europa 1900-1925*, Roma, Campisano, 2014.

⁹ 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)*, cit., pp. 66-67.

¹⁰ M. Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-40)*, Roma, Carocci, 2009, pp. 62-63.

¹¹ R.D. 16 febbraio 1905, n. 40 – *Nuovo regolamento per gli studi di perfezionamento nella storia dell'arte medioevale e moderna presso la R. Università di Roma*, in <<https://patrimonio.archivio.senato.it/inventario/archivio-centrale-dello-stato/raccolta-ufficiale-leggi-e-decreti>> (ultimo accesso: 20.12.2024).

¹² Cfr. G. Agosti, *La nascita della storia dell'arte in Italia. Adolfo Venturi dal museo all'università 1880-1940*, Venezia, Marsilio, 1996, pp. 161-162.

¹³ Si veda al riguardo il già ricordato lavoro di Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-1940)*, cit., pp. 300-304.



Pic. 1. Adolfo Venturi con un gruppo di allieve e allievi del Corso di perfezionamento in Storia dell'arte medievale e moderna dell'Università di Roma, Venezia 30 maggio 1924 (foto: Cav. G. Fiorentini, Calle Specchieri 652 – Venezia), originale conservato nelle *Carte Adolfo Venturi*, in Centro Archivistico della Scuola Normale Superiore di Pisa

tere all'Università di Roma con una tesi in storia dell'arte sotto la guida dello studioso modenese e come anche in seguito, grazie al suo allievo e successore sulla cattedra della Sapienza Pietro Toesca, la tesi di laurea in storia dell'arte nella facoltà di Lettere abbia costituito una sorta di canale privilegiato per l'accesso al corso di perfezionamento *post lauream*¹⁴.

Ai fini della nostra indagine sui destini professionali e sulle carriere della prima generazione di storiche dell'arte italiane formatesi nel periodo tra le due guerre abbiamo preso in esame gli itinerari e le esperienze vissute da circa un centinaio di studiose – 99 per l'esattezza – la maggior parte delle quali risulta aver frequentato la *Scuola di perfezionamento in storia dell'arte medioevale e moderna* dell'Università di Roma (ben 94 sul totale di 99). Tra queste, debbono essere segnalate studiose destinate a lasciare un segno rilevante nel campo degli studi, dell'insegnamento e della tutela del patrimonio storico-artistico, come ad esempio Costanza Lorenzetti, Eva Tea, Giulia Sinibaldi, Mary Pittaluga, Anna Maria Brizio, Luisa Becherucci, Palma Bucarelli, Augusta Ghidiglia Quintavalle e la già ricordata Paola Della Pergola¹⁵.

Del piccolo gruppo di studiose che, pur non avendo frequentato la *Scuola di perfezionamento* della Sapienza si sono formate e affermate professionalmente nello stesso periodo, abbiamo ritenuto opportuno collocare nel campione delle 99 storiche dell'arte di cui approfondire l'itinerario scientifico e professionale,

¹⁴ Si tratta, in realtà, solo di una stima fondata sulle iscritte alla *Scuola di perfezionamento* delle quali siamo riusciti a ritrovare la tesi di laurea in Storia dell'arte medioevale e moderna discussa, nel periodo da noi preso in considerazione, presso la Facoltà di Lettere e Filosofia dell'Università di Roma.

¹⁵ L'elenco completo, per ordine alfabetico, delle studiose iscritte alla *Scuola di perfezionamento in storia dell'arte medioevale e moderna* della Sapienza di Roma delle quali abbiamo preso in esame l'itinerario formativo e poi quello professionale è il seguente: Letizia Abbaticola, Maria Accascina, Alma Andreani, Bianca Maria Arbib, Adriana Arfelli, Argia Astrologo Chimenz, Luisa Becherucci, Isabella Bellini, Alessandra Bergamo, Lidia Bianchi, Ada Bonsignore, Anna Maria Brizio, Giulia Brunetti, Palma Bucarelli, Lea Campanelli, Jole Carnemolla, Rosmunda Castrati, Giuditta Castrì, Maria Cesarina Cesari, Beatrice Chioventa, Lisetta Ciaccio Motta, Anna Maria Ciaranfi Francini, Maria Ciartoso Lorenzetti, Amelia Ciatelli, Clara Circolo, Licia Collobi Ragghianti, Carmela D'Urso, Giuseppina De Aloysio, Silvia De Vito Battaglia, Paola Della Pergola, Paola Di Capula, Eleonora Diena Terzina, Luisa Fasella, Egiziaca Favorini, Laura Filippini, Fatma Franchetti, Carmelina Frasca, Anna Maria Gabbrielli, Noemi Gabrielli, Maria Rosa Gabrielli Gagliardi, Anna Gaeta, Augusta Ghidiglia Quintavalle, Annita Giacchetti, Maria Giani Zaccarini, Lidia Gigliotti, Vera Giovannozzi Daddi, Nina Gurovich, Giuseppina Jona, Maria Krascheninnicowa, Lalage Kulczycka, Giuseppina Lattuca, Valentina Leonardi, Lucia Lopresti Longhi (pseudonimo: *Anna Banti*), Costanza Lorenzetti, Maria Luceri, Aurora Luciani, Eleonora Malinconico, Anna Maria Maoli, Caterina Marcenaro, Tatiana Martinez, Clotilde Mezzetti, Elena Mirolli, Carmela Mòlica, Pasqualina (Lina) Montalto Tentori, Emma Monti, Antonia Nava Cellini, Vanda Oberholzer, Anna Oddi, Paola Palermo, Anna Pellegrini, Maria Perotti, Mary Pittaluga, Claudia Polinori, Maria Preceruti, Maria Preti, Livia Romiti, Angiolina Rossi, Gabriella Santoro, Graziella Savorini, Beatrice Serra, Maria Teresa Silvaggi, Giulia Sinibaldi, Giuseppina Soave, Lydia Straneo, Elena Tamajo, Silvia Terra Abrami, Jolanda Testini, Ornella Tomassoni, Maria Luigia Tosi, Maria Teresa Tozzi Marciandò Agostinelli, Rossanna Tozzi Pedrazzi, Eva Tea, Dirce Viana e Emma Zocca.

ci limitiamo qui a richiamare personalità del calibro di Giusta Nicco Fasola e Fernanda Wittgens¹⁶.

2. *La legislazione fascista sull'accesso delle donne al mondo del lavoro e delle professioni: una storia di esclusione e di emarginazione*

Prima di esaminare le carriere e le scelte operate, nel corso del ventennio fascista e poi nel secondo dopoguerra, dalle 99 studiose sopra richiamate deve essere segnalato come l'ascesa della prima generazione di storiche dell'arte in Italia si sia realizzata in un contesto decisamente ostile alla presenza femminile in ambito professionale, come testimoniano i numerosi provvedimenti volti ad escludere le donne da taluni uffici e da talune carriere o a limitare drasticamente il loro numero all'interno della pubblica amministrazione e in alcune professioni, prime fra tutte quelle relative all'istruzione e all'insegnamento.

Sul piano generale, ad esempio, è appena il caso di ricordare che con il R.D.-L. 28 novembre 1933, n. 1554, venivano introdotte nuove direttive riguardo alle «assunzioni delle donne» nella pubblica amministrazione. In particolare, era stabilito che «le Amministrazioni dello Stato, comprese quelle con ordinamento autonomo», erano «autorizzate a stabilire nei bandi di concorso per nomine ad impieghi, comunque denominati, nei rispettivi servizi, l'esclusione delle donne dalle assunzioni ovvero i limiti entro i quali le assunzioni di personale femminile possono avere effetto»¹⁷.

Con i successivi R.D. 5 settembre 1938, n. 1514, e R.D. 29 giugno 1939, n. 898, infine, l'assunzione delle donne negli impieghi pubblici e privati era ridotta «ad una quota massima del 10%» e limitata solo a taluni ruoli e mansioni giudicati idonei al mondo femminile, ovvero ad «impieghi relativi a servizi che per la loro natura non possono essere disimpegnati che da donne» e a quelli «particolarmente adatti per le donne»¹⁸.

Altrettanto incisivi e introdotti ancora prima, ossia agli albori del ventennio fascista, erano i provvedimenti in materia varati nell'ambito dell'istruzione pubblica e privata e della scuola. In particolare, con il R.D. 6 maggio 1923, n.

¹⁶ L'elenco completo è il seguente: Elena Berti Toesca, Irene Cattaneo, Maria Luisa Gengaro, Giusta Nicco Fasola e Fernanda Wittgens.

¹⁷ R.D.-L. 28 novembre 1933, n. 1554 – *Norme sulle assunzioni delle donne nelle Amministrazioni dello Stato*, «Gazzetta Ufficiale del Regno d'Italia», 30 novembre 1933, n. 277, pp. 5432-5433 (poi convertito nella Legge 18 gennaio 1934, n. 221), articolo unico.

¹⁸ R.D. 5 settembre 1938, n. 1514 – *Disciplina dell'assunzione di personale femminile agli impieghi pubblici e privati*, «Gazzetta Ufficiale del Regno d'Italia», 5 ottobre 1938, n. 228, pp. 4162-4163 (poi convertito nella Legge 5 gennaio 1939, n. 77), art. 1; e R.D. 29 giugno 1939, n. 898 – *Norme circa l'assunzione di personale femminile negli impieghi pubblici e privati*, «Gazzetta Ufficiale del Regno d'Italia», 3 luglio 1939, n. 153, pp. 3020-3021, artt. 1 e 4.



Pic. 2. Adolfo Venturi con un gruppo di allieve e allievi del Corso di perfezionamento in Storia dell'arte medievale e moderna dell'Università di Roma, Modena 6 maggio 1926 (Foto: Cav. Umberto Orlandini, Via Castellaro 6-8 – Modena), originale conservato nelle *Carte Adolfo Venturi*, in Centro Archivistico della Scuola Normale Superiore di Pisa

1054, che nel quadro della riforma gentiliana avviava il riordinamento della istruzione secondaria, veniva stabilito che le donne erano escluse dall'ufficio di preside e capo d'istituto¹⁹, mentre i successivi R.D. 9 dicembre 1926, n. 2480, e R.D. 20 giugno 1929, n. 1043, disponevano, il primo, che i concorsi e gli esami di abilitazione per l'insegnamento nelle scuole secondarie di discipline quali lettere italiane, lettere classiche greche e latine, storia, geografia, filosofia, pedagogia, diritto ed economia politica fossero esclusivamente «riservati agli uomini»²⁰; il secondo, che alle donne fosse vietata «l'iscrizione alla Scuola Normale Superiore di Pisa»²¹. Infine, con la legge 1° luglio 1940, n. 899, in

¹⁹ R.D. 6 maggio 1923, n. 1054 – *Ordinamento della istruzione media e dei convitti nazionali*, «Gazzetta Ufficiale del Regno d'Italia», 2 giugno 1923, n. 129, pp. 4350-4369, art. 12.

²⁰ R.D. 9 dicembre 1926, n. 2480 – *Regolamento per i concorsi a cattedre nei Regi istituti medi d'istruzione e per le abilitazioni all'esercizio professionale dell'insegnamento medio*, «Gazzetta Ufficiale del Regno d'Italia», 29 marzo 1927, n. 73, pp. 1342-1364, art. 11.

²¹ R.D. 20 giugno 1929, n. 1043 – *Modifiche al Regolamento della Regia Scuola Normale*

continuità con le norme introdotte precedentemente, si stabiliva che alle donne fosse anche preclusa la carriera di preside nella nuova scuola media istituita dal ministro Giuseppe Bottai all'indomani dell'approvazione della *Carta della Scuola* (1939)²².

3. *La difficile ascesa professionale nell'ambito dell'amministrazione delle Antichità e Belle Arti, della scuola e dell'università*

Alla luce del quadro normativo sopra delineato, il quale peraltro introduceva ulteriori e pesanti restrizioni nell'ambito di un contesto professionale, quello relativo all'età giolittiana e al primo dopoguerra, già ampiamente caratterizzato da pregiudizi, divieti e limitazioni nei confronti dell'occupazione femminile²³, non sorprende il modesto numero di donne chiamate a ricoprire uffici e funzioni di grado elevato in seno all'amministrazione delle Antichità e Belle Arti.

Maria Mignini ha sottolineato, ad esempio, come «la strada dell'ispettorato sembrava destinata a rimanere elitaria e piuttosto resistente alla femminilizzazione: banditi sporadicamente, i concorsi ministeriali che avrebbero potuto consentire d'intraprendere il mestiere d'ispettore rischiavano infatti di prostrare nell'attesa anche le più vive aspirazioni. [...] Le istituzioni di tutela continuavano difatti a dare accesso a un numero del tutto irrisorio di quanti, ostinatamente, perseveravano negli studi»²⁴.

In effetti, relativamente agli anni Trenta, i posti da ispettore nel comparto delle Antichità e Belle Arti messi a concorso furono davvero limitati e non tutti, naturalmente, destinati agli storici dell'arte²⁵. Lo rilevava sconsolatamente

Superiore di Pisa, art. 4, in <<https://patrimonio.archivio.senato.it/inventario/archivio-centrale-dello-stato/raccolta-ufficiale-leggi-e-decreti>> (ultimo accesso: 20.12.2024).

²² Legge 1° luglio 1940, n. 899 – *Istituzione della Scuola media*, «Gazzetta Ufficiale del Regno d'Italia», 25 luglio 1940, n. 173, art. 9, pp. 2787-2790.

²³ Cfr. Ch. Giorgi, G. Melis, A. Varni, *L'altra metà dell'impiego: la storia delle donne nell'amministrazione*, Bologna, Bononia University Press, 2005; G. Vicarelli (ed.), *Donne e professioni nell'Italia del Novecento*, Bologna, il Mulino, 2007; e S. Ortaggi Cammarosano, *Donne, lavoro, Grande Guerra*, Milano, Unicopli, 2009.

²⁴ Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-1940)*, cit., p. 165.

²⁵ Nel corso degli anni Trenta, ad esempio, furono bandite due sole tornate concorsuali. La prima, nel febbraio del 1933, con *Avviso di concorso per titoli ed esami a 14 posti di Ispettore aggiunto (Gruppo A) nel ruolo del personale dei musei, dei monumenti delle gallerie e degli scavi di antichità* («Bollettino Ufficiale del Ministero della Educazione Nazionale», II, Atti di Amministrazione, 23 febbraio 1933, I, 8, pp. 625-628). Le vincitrici per il comparto storico-artistico, nominati in data 16 agosto 1933, furono le seguenti: Mariarosa Gabrielli, Anna Maria Ciaranfi, Palma Bucarelli, Fernanda Wittgens e Luisa Becherucci (cfr. *Antichità e Belle Arti, Personale dei monumenti, musei, gallerie e scavi di antichità, Personale di gruppo A, Nomine*,

Paola Della Pergola che in una lettera redatta sul finire degli anni Trenta annotava: «8 [posti in tutto messi a concorso] nel 1934; 4 nel 1935; nessuno nel 1936, e questo fra Archeologia, Storia dell'Arte, Egittologia ecc.»²⁶.

Deve essere sottolineato, tuttavia, che proprio in questo comparto, nel periodo tra le due guerre, è dato di riscontrare *per la prima volta* l'impiego di un certo numero di storiche dell'arte nei ruoli ispettivi e direttivi, ossia in posizioni apicali che fino ad allora erano state ricoperte pressoché esclusivamente da figure maschili. La *Scuola di perfezionamento in storia dell'arte medievale e moderna* dell'Università di Roma, a questo riguardo, ha costituito la grande fucina dalla quale sono uscite le prime giovani studiose destinate, tra gli anni Venti e Trenta, ad occupare posti di rilievo nelle soprintendenze, nelle gallerie d'arte e nei musei della penisola. Basti dire che, delle 20 storiche dell'arte chiamate tra il 1902 e il 1940 a ricoprire il ruolo di *ispettrici* del comparto della Antichità e Belle Arti²⁷, ben 13 erano state allieve e si erano formate nella *Scuola di perfezionamento* fondata e diretta da Adolfo Venturi.

Per vedere delle donne al vertice delle istituzioni di conservazione e tutela, ossia alla guida delle soprintendenze e alla direzione di musei e gallerie d'arte occorrerà attendere gli anni del secondo conflitto mondiale e poi la prima fase dell'Italia democratica e repubblicana. Anche in questo caso, la generazione delle storiche dell'arte formatesi nella *Scuola di perfezionamento* di Adolfo Venturi rivestirà un ruolo di primaria importanza, come testimoniano, ad esempio, la nomina avvenuta fin dal 1942 di *Palma Bucarelli* a soprintendente della Galleria Nazionale d'Arte Moderna di Roma (prima direttrice donna di un museo pubblico in Italia!)²⁸ e quelle di *Paola Della Pergola* nel 1948 alla

«Bollettino Ufficiale del Ministero della Educazione Nazionale», II, Atti di Amministrazione, 23 novembre 1933, II, 47, pp. 3624-3626). La seconda, varata al principio dell'anno seguente e conclusasi in luglio, registrò tra le vincitrici per il comparto storico-artistico: Noemi Gabrielli e Giulia Sinibaldi (cfr. *Antichità e Belle Arti, Personale dei monumenti, musei, gallerie e scavi di antichità, Personale di gruppo A, Nomine ad ispettore aggiunto in prova*, «Bollettino Ufficiale del Ministero della Educazione Nazionale», II, Atti di Amministrazione, 13 settembre 1934, II, 37, pp. 2596-2597).

²⁶ Tale questione divenne oggetto di una forte denuncia in un articolo di Paola Della Pergola che per ragioni di opportunità politica non fu mai pubblicato su «L'Arte» e che una ventina di anni fa è stato edito in appendice a M. Mignini, *Storia dell'arte al femminile. L'insegnamento delle donne nel liceo classico durante il fascismo*, «Ricerche di Storia dell'Arte», 2003, n. 79, pp. 67-68.

²⁷ L'elenco comprende: Luisa Becherucci, Lidia Bianchi, Iole Bovio Marconi, Palma Bucarelli, Lorenzina Cesano, Anna Maria Ciaranfi Francini, Licia Collobi Ragghianti, Nicoletta Costanzi, Paola Della Pergola, Ornella Elia, Noemi Gabrielli, Maria Rosa Gabrielli Gagliardi, Augusta Ghidiglia Quintavalle, Alda Levi Spinazzola, Pasqualina Montalto Tentori, Lucia Morpurgo, Elena Romano, Giulia Sinibaldi, Bruna Tamaro Forlati e Fernanda Wittgens.

²⁸ Cfr. M. Picciau, *Palma Bucarelli*, in *Dizionario biografico dei soprintendenti storici dell'arte (1904-1974)*, Bologna, Bonomia University Press, 2007, pp. 124-130. Ma si vedano anche: M. Convito, *La Galleria nazionale d'arte moderna di Roma sotto la direzione di Palma Bucarelli (1946-1975). Alcune considerazioni sulla politica culturale del Museo d'arte Contemporanea tra considerazione e promozione della ricerca artistica*, «Bollettino della Unione di

direzione della Galleria Borghese di Roma²⁹, di *Noemi Gabrielli* nel 1952 alla soprintendenza alle Gallerie del Piemonte³⁰, di *Luisa Becherucci* nel 1957 alla direzione degli Uffizi di Firenze³¹ e di *Augusta Ghidiglia Quintavalle* alla guida di vari musei e poi ai vertici della soprintendenza alle Gallerie Nazionali di Parma e Piacenza, tra il 1960 e il 1967, e di Firenze e Pistoia, dal 1973 al 1974³².

Del tutto differente, per modalità e dimensioni, sarebbe stato l'accesso della prima generazione di storiche dell'arte italiane all'insegnamento scolastico³³. Con la riforma della scuola realizzata dal ministro della Pubblica Istruzione Giovanni Gentile nel 1923, com'è noto, la storia dell'arte, veniva introdotta per la prima volta come disciplina ufficiale e obbligatoria nel piano di studi del Liceo classico e, sia pure come materia facoltativa, in quello del neoistituito Liceo femminile³⁴.

Occorre ricordare tuttavia che, per ragioni meramente finanziarie, per la nuova disciplina non fu deliberata l'istituzione di apposite cattedre di ruolo; l'insegnamento della storia dell'arte, infatti, sarebbe stato «conferito per inca-

Storia e Arte», vol. VII, 2005, pp. 54-68; e L. Cantatore, E. Sassi, *Palma Bucarelli: immagini di una vita*, Roma, Palombi, 2011

²⁹ Si veda P. Dragoni, *Paola Della Pergola, la «signorina» Direttrice della Galleria Borghese*, in E. Carrara, P. Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, «Il Capitale Culturale», Supplementi n. 13, 2022, pp. 715-730. Anche la scheda di G. Rotondi Terminiello, *Paola Della Pergola*, in *Dizionario biografico dei soprintendenti storici dell'arte (1904-1974)*, cit., pp. 201-206.

³⁰ Cfr. Bertolotto, *Noemi Gabrielli*, in *Dizionario biografico dei soprintendenti storici dell'arte (1904-1974)*, cit., pp. 266-277.

³¹ Si vedano C. De Benedictis, G. Giusti, M. Miniati, E. Pallotta (edd.), *Presenze femminili nella cultura del Novecento. Adriana Tramontano, Maria Luisa Bonelli Righini, Luisa Becherucci*, Firenze, Centro Di, 2008; e, soprattutto, E.C. Gagliardi, *Il Direttorato di Luisa Becherucci agli Uffizi: rinnovamento e avventure*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 743-752.

³² Cfr. L. Ciancabilla, *Augusta Ghidiglia Quintavalle e la «stagione degli stacchi» fra ritrovamenti, mostre e musealizzazioni*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 567-578. Anche la scheda di Fornari Schianchi, *Augusta Ghidiglia Quintavalle*, in *Dizionario biografico dei soprintendenti storici dell'arte (1904-1974)*, cit., pp. 278-283.

³³ A conferma delle patenti discriminazioni e dei forti pregiudizi esistenti nei riguardi dell'insegnamento femminile nelle scuole secondarie si vedano: G. Sangiorgio, *Il nuovo regolamento dei concorsi-esami di stato per le cattedre d'insegnamento medio e per l'abilitazione all'esercizio professionale*, «Annali della Istruzione Media», vol. II, 1926, pp. 247-261; e A. Perna, *Le donne insegnanti nelle Scuole Medie*, «Annali della Istruzione Media», vol. II, 1927, pp. 455-475.

³⁴ Per un approfondimento sulle origini e le vicissitudini di tale insegnamento prima e dopo la riforma scolastica varata dal ministro Gentile nel 1923 si vedano: Sani, *La Storia dell'Arte come disciplina scolastica. Dal primo Novecento al secondo dopoguerra*, cit.; e Meyer, *Cenerentola a scuola. Il dibattito sull'insegnamento della storia dell'arte nei licei (1900-1943)*, cit. Sul ruolo esercitato da talune delle allieve di Adolfo Venturi in qualità di insegnanti liceali di storia dell'arte si veda ora S.A. Meyer, R. Sani, *Mary e le altre. Le allieve di Adolfo Venturi e le origini dell'insegnamento scolastico della Storia dell'Arte nell'Italia fascista (1922-1943)*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 95-96.

rico» ogni anno «dal preside» dell'istituto e remunerato, al pari delle supplenze, con una retribuzione assai contenuta e limitatamente ai «mesi di lezioni e di esami, e sempre per il servizio effettivamente prestato»³⁵.

A fronte della condizione di assoluta precarietà giuridica ed economica dei titolari della disciplina, sancita dall'incarico annuale conferito dai presidi all'inizio di ciascun anno scolastico e dalla mediocre retribuzione riconosciuta ai titolari di detto incarico, decisamente elevati erano i requisiti richiesti per insegnare la storia dell'arte nei Licei. Nel provvedimento con il quale si stabilivano le disposizioni per il conferimento degli incarichi d'insegnamento negli istituti di istruzione secondaria, a questo riguardo, un apposito capitolo era dedicato proprio alla storia dell'arte e in esso si raccomandava ai presidi di procedere, nell'assegnazione degli incarichi d'insegnamento, dando ove possibile la preferenza a «I dottori in lettere che abbiano conseguito presso l'Università di Roma il diploma del corso di perfezionamento negli studi dell'arte medievale e moderna»³⁶, ossia proprio il corso *post-lauream* fondato e diretto da Adolfo Venturi.

Con la preferenza accordata dal provvedimento ministeriale al titolo rilasciato dalla *Scuola di perfezionamento* della Sapienza ai fini del reclutamento degli insegnanti di storia dell'arte nei Licei, l'insegnamento scolastico diventava, di fatto, un nuovo e assai importante sbocco occupazionale per i laureati dell'indirizzo storico-artistico, in particolare per le donne, la cui presenza tra gli incaricati di storia dell'arte nei Licei avrebbe conosciuto una crescita costante e raggiunto livelli elevati³⁷.

Basti dire che, se nell'anno scolastico 1923-24, il primo di applicazione del-

³⁵ Cfr. R.D. 6 maggio 1923, n. 1054 – *Ordinamento della istruzione media e dei convitti nazionali*, «Gazzetta Ufficiale del Regno d'Italia», 2 giugno 1923, n. 129, art. 27, tabelle n. 6 e 8, rispettivamente alle pp. 4352 e 4361-4363.

³⁶ Cfr. C.M. 11 settembre 1923, n. 75 – *Conferimento delle supplenze e degli incarichi negli Istituti di istruzione media per l'anno scolastico 1923-924*, «Bollettino Ufficiale del Ministero della Pubblica Istruzione», II, 13 settembre 1923, 38, pp. 3078-3086.

³⁷ In realtà, le disposizioni contenute nel *Regolamento pei concorsi a cattedre nei Regi istituti medi di istruzione e per le abilitazioni all'esercizio professionale dell'insegnamento medio*, varato nel settembre del successore di Gentile alla Minerva Alessandro Casati e, più in particolare, i provvedimenti successivi emanati in applicazione di tale *Regolamento* erano destinati a mutare profondamente il quadro determinato nella prima fase della riforma. Allo scopo di garantire un più efficace controllo statale sulla preparazione di coloro che aspiravano ad insegnare nelle scuole secondarie, infatti, il provvedimento introduceva l'*abilitazione professionale obbligatoria*. Su tale base, anche coloro che aspiravano ad ottenere l'incarico d'insegnamento della Storia dell'Arte nei licei furono obbligati a sottoporsi all'esame di abilitazione, per il conseguimento della quale venne stabilito dal successore di Casati, il ministro Pietro Fedele, che i candidati avrebbero dovuto essere in possesso della sola laurea in Lettere o in Filosofia, senza nessuna specificazione (esami speciali sostenuti, argomento della tesi di laurea ecc.) e senza alcun ulteriore titolo *post lauream* di carattere specialistico. Approvati e resi esecutivi i risultati degli esami di abilitazione all'insegnamento della Storia dell'Arte, Nell'agosto del 1928, infine, il nuovo titolare della Minerva, Giuseppe Belluzzo, stabilì che nella scelta degli aspiranti all'incarico di docente della disciplina i presidi dovessero dare la «preferenza assoluta» a coloro che avessero

la riforma Gentile, dei 156 corsi d'insegnamento di storia dell'arte istituiti 33 erano tenuti da donne³⁸; nell'anno scolastico 1939-40, l'ultimo prima dell'entrata in guerra dell'Italia, dei 228 insegnamenti allora esistenti ben 68 erano tenuti da insegnanti di sesso femminile³⁹.

Notevole, fin dalle origini, fu la presenza, tra le insegnanti della disciplina, di diplomate della *Scuola di perfezionamento in storia dell'arte medievale e moderna* dell'Università di Roma. Nell'anno scolastico 1923-24 esse ammontavano a 10 unità sul totale di 33⁴⁰, mentre nell'anno scolastico 1939-40 erano a 14 su 68⁴¹.

L'accesso all'insegnamento liceale della storia dell'arte da parte di una vivace e agguerrita generazione di giovani studiose assunse, peraltro, una particolare rilevanza allorché, con il già ricordato R.D. 9 dicembre 1926, n. 2480, il regime fascista dispose che le donne fossero escluse dall'insegnamento delle principali discipline umanistiche (oltre che giuridiche e socio-economiche) impartite nelle scuole secondarie. La storia dell'arte, sotto questo profilo, era destinata a divenire uno dei baluardi della presenza femminile nell'insegnamento secondario di carattere umanistico e, allo stesso tempo, uno dei pochi ambiti di studio e di ricerca nel quale le donne potevano sperimentare inediti e autorevoli percorsi di crescita culturale e scientifica.

L'insegnamento liceale, infatti, costituì – e fu percepito da non poche tra le giovani neo-insegnanti di storia dell'arte – come una sorta di trampolino di lancio verso carriere e incarichi di docenza ancor più elevati e prestigiosi. Tra il 1925 e il 1940, a questo riguardo, talora su diretta sollecitazione dello stesso Adolfo Venturi⁴², talune tra le più preparate e brillanti diplomate della

conseguito la suddetta abilitazione, ancorché forniti della sola laurea in Lettere o in Filosofia e di nessun ulteriore titolo specifico attestante la specializzazione in campo storico-artistico.

³⁸ Si veda al riguardo *Annuario del Ministero della Pubblica Istruzione 2024*, Roma, Libreria dello Stato, 1924, pp. 319-411.

³⁹ Cfr. *Annuario del Ministero dell'Educazione Nazionale: 1940 – anno XVIII*, Roma, Istituto Poligrafico dello Stato, 1940, pp. 511-546.

⁴⁰ Si tratta di Maria Accascina, Alma Andreani, Elena Berti, Anna Brizio, Argia Chimenz Astrologo, Maria Ciartoso Lorenzetti, Costanza Lorenzetti, Pasqualina Montalto Tentori, Mary Pittaluga e Giulia Sinibaldi.

⁴¹ Si tratta di Maria Accascina, Maria Ciartoso Lorenzetti, Licia Collobi Ragghianti, Paola Della Pergola, Egiziaca Favorini, Anna Maria Gabrielli, Maria Giani, Giuseppina Jona, Caterina Marcenaro, Antonia Nava Cellini, Maria Teresa Silvaggi, Maria Luigia Tosi, Maria Teresa Tozzi Marciànò Agostinelli e Rosanna Tozzi Pedrazzi.

⁴² In una lettera inviata il 29 settembre 1925 a Mary Pittaluga, ad esempio, Adolfo Venturi scriveva: «Lei deve tenere di mira la Sua libera docenza, ché l'insegnamento universitario non l'affaticherà di soverchio. Ultimata la libera docenza, io vedrò di aprirle la via alla cattedra universitaria di Napoli» (in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, MP_Cart-XXXXVIII –Venturi Adolfo (8 maggio 1917-10 giugno 1941), 062). Analogamente, in una lettera inviata il 1° aprile 1930 allo studioso modenese, un'altra sua allieva, Giulia Sinibaldi, si mostrava grata per l'incoraggiamento ricevuto a presentare domanda per la libera docenza: «Le ripeto tutti i miei ringraziamenti più vivi e più affettuosi per il Suo assiduo aiuto e per l'incoraggiamento a presentarmi all'esame di libera docenza quest'anno. Sono stata

Scuola di perfezionamento romana parteciparono al relativo concorso e conseguirono la *libera docenza* in Storia dell'arte medioevale e moderna, facendo registrare, anche su questo versante, una vera e propria rottura con il passato, dal momento che tale titolo accademico aveva costituito fino a quel momento una prerogativa quasi esclusivamente maschile. Nel periodo sopra richiamato furono ben 6 le «libere docenti in storia dell'arte» ufficialmente nominate negli atenei italiani: *Mary Pittaluga* (Università di Firenze, 1925), *Eva Tea* (Università Cattolica di Milano, 1927), *Giulia Sinibaldi* (Università di Firenze, 1930), *Anna Maria Brizio* (Università di Torino, 1930), *Maria Luisa Gengaro* (Università di Milano, 1937), *Costanza Lorenzetti* (Università di Napoli, 1938).

Diverse altre studiose del settore furono chiamate, in quello stesso arco di tempo, a ricoprire il ruolo di «assistente volontaria» presso le varie cattedre universitarie di storia dell'arte o a tenere corsi e seminari della disciplina nelle Facoltà di Lettere o in quelle di Architettura della penisola, come nel caso di Maria Accascina, Lidia Bianchi, Anna Maria Ciaranfi Francini, Caterina Marcenaro, Giusta Nicco Fasola, Maria Luisa Gengaro, Maria Perotti ed Eva Tea, per fare solo qualche esempio⁴³.

È pur vero, tuttavia, che per veder approdare una storica dell'arte ai vertici della carriera universitaria e dell'insegnamento superiore occorrerà attendere la caduta del fascismo e la fine della Seconda guerra mondiale. Tra la seconda metà degli anni Quaranta e la prima metà del decennio seguente, infatti, dopo che Costanza Lorenzetti ed Eva Tea avevano ottenuto la titolarità della cattedra di storia dell'arte rispettivamente nell'Accademia di Belle Arti di

tanto felice di questo Suo incoraggiamento, quanto di sapere che Ella è Presidente della Commissione» (in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, Cart-XXXI,2474 – *Sinibaldi, Giulia* (27 ottobre 1924-3 marzo 1941), VT S2 b057,13).

⁴³ Maria Perotti ricoprì a lungo l'incarico di assistente volontaria presso la cattedra di Storia dell'arte medioevale e moderna tenuta da Adolfo Venturi nella Facoltà di Lettere e Filosofia dell'Università di Roma, nonché quello di segretaria della *Scuola di perfezionamento in storia dell'arte medievale e moderna* del medesimo Ateneo; Eva Tea fu incaricata di Storia dell'arte nella Facoltà di Lettere e Filosofia dell'Università Cattolica del sacro Cuore di Milano a partire dall'anno accademico 1927-1928; Maria Accascina tenne corsi liberi di Storia dell'arte presso le università di Roma, Cagliari e Messina a partire dai primi anni Trenta; Anna Maria Ciaranfi Francini fu, a partire dal 1931, assistente di ruolo della cattedra di storia dell'arte moderna e del rinascimento tenuta da Pietro Toesca presso la Facoltà di Lettere e Filosofia dell'Università di Roma; Lidia Bianchi fu, tra il 1936 e il 1939, assistente volontaria della cattedra di Storia dell'arte medioevale e moderna tenuta da Pietro Toesca nella Facoltà di Lettere e Filosofia dell'Università di Roma (ottenne poi la libera docenza nel 1943); Caterina Marcenaro fu incaricata di Storia dell'arte, tra il 1945 e il 1951, presso la Facoltà di Magistero dell'Università di Genova; Maria Luisa Gengaro fu, dal 1937, assistente di ruolo nell'Istituto di Storia dell'arte dell'Università di Milano e incaricata, a partire dallo stesso anno, di Storia della critica d'arte nella locale Facoltà di Lettere e Filosofia; Giusta Nicco Fasola, infine, dopo essere stata negli anni Venti assistente volontaria della cattedra di Storia dell'arte tenuta da Lionello Venturi presso la Facoltà di Lettere e Filosofia dell'Università di Torino, fu incaricata di estetica e trattatistica dell'architettura nella Facoltà di Architettura dell'Università di Firenze.

Napoli e in quella di Milano Cattolica⁴⁴, per la prima volta due donne erano nominate «professore ordinario» della disciplina negli atenei della penisola: si tratta dell'antica allieva e collaboratrice di Adolfo Venturi, Anna Maria Brizio, divenuta nell'anno accademico 1946-47 titolare della cattedra di storia dell'arte presso la facoltà di Magistero dell'Università di Torino, da dove poi, un decennio più tardi, si sarebbe trasferita su quella della facoltà di Lettere e Filosofia della Statale di Milano⁴⁵; e di Giusta Nicco Fasola, allieva di Lionello Venturi, la quale, a partire dall'anno accademico 1953-54, sarebbe stata chiamata sulla cattedra di storia dell'arte della facoltà di Lettere e Filosofia dell'Università di Genova⁴⁶.

4. *Una presenza femminile autorevole nel dibattito storico-artistico italiano e internazionale*

Ma l'ampliamento degli sbocchi professionali e l'accesso della prima generazione di storiche dell'arte a ruoli e funzioni fino a quel momento riservati pressoché esclusivamente a figure maschili costituisce solo un aspetto, ancorché molto rilevante, della realtà. L'altro aspetto, strettamente collegato con questo inedito e rilevante protagonismo femminile nel settore, è quello relativo alla crescente e sempre più autorevole presenza delle diplomate della *Scuola di perfezionamento in storia dell'arte medievale e moderna* dell'Università di Roma, e delle altre studiose delle quali abbiamo preso in considerazione le carriere, nel dibattito storico-artistico italiano e internazionale. Al fine di lumeggiare tale presenza, ci avvarremo di una serie di 'indicatori' relativi a diversi aspetti della vita culturale e della produzione scientifica di questo periodo.

In primo luogo, è opportuno richiamare l'attenzione sulla collaborazione offerta da questa prima generazione di storiche dell'arte a quella che può essere

⁴⁴ Cfr. C. Malice, *Costanza Lorenzetti: una brillante allieva di Adolfo Venturi tra l'Accademia di Belle arti e l'Università di Napoli*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 151-182; M. Pilutti Namer, *Le lettere di Eva Tea ad Adolfo Venturi*, *ibid.*, pp. 73-88.

⁴⁵ Cfr. A.M. Bisio, R. Rivabella, *Anna Maria Brizio libera e lucente Maestra d'intelligenza*, Sale (Al), Associazione ex Allievi/e Istituto Sacro Cuore, 2002; M.G. Leonardi, «*Se si perde la presa sul presente, anche il passato si restringe*». *Anna Maria Brizio e Corrente, viaggio in tre tappe*, ora in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 839-866.

⁴⁶ Si vedano al riguardo i tre contributi – L. Magnani, *Giusta Nicco Fasola e Ezia Gavazza: una linea al femminile per la scuola genovese di storia dell'arte*; A. Leonardi, «Interferenze culturali» per la Storia dell'Arte a Genova. *Giusta Nicco Fasola (1901-1960) ed Ezia Gavazza (1928-2019)*; M. Massarente, *Giusta Nicco Fasola e la storia dell'arte a Genova* – raccolti ora in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 199-210, 212-237, 239-253.

senza alcun dubbio considerata come una delle più importanti imprese culturali ed editoriali del periodo tra le due guerre: la realizzazione dell'*Enciclopedia italiana di Scienze, lettere e arti*, fondata e finanziata dall'imprenditore Giovanni Treccani, avviata e diretta da Giovanni Gentile a partire dal 1925 e stampata tra il 1929 e il 1937⁴⁷.

Pur escluse da tutti i ruoli chiave dell'impresa (coordinamento, direzione delle sezioni e sottosezioni ecc.) in ragione dei pregiudizi nutriti all'epoca nei riguardi del mondo femminile, le studiose da noi prese in considerazione ebbero un ruolo significativo nella realizzazione dell'*Enciclopedia italiana*, in particolare per quel che attiene alla specifica sezione di «Storia dell'arte», diretta inizialmente da Ugo Ojetti e poi, a partire dal 1929, da Pietro Toesca e Arduino Colasanti. Va detto, infatti, che circa un terzo delle 188 collaboratrici femminili all'*Enciclopedia italiana* (sul totale di 3272 collaboratori) operarono proprio nella sezione di «Storia dell'arte»; delle 63 studiose della sezione, poco meno della metà erano straniere e ben 35 di nazionalità italiana⁴⁸.

Tra queste ultime, come ampiamente documentato dalle recenti e puntuali ricerche di Claudio Gamba, troviamo una cospicua rappresentanza di diplomate della *Scuola di perfezionamento in storia dell'arte medievale e moderna* dell'Università di Roma e del restante piccolo gruppo di studiose delle quali abbiamo preso in considerazione le carriere: Maria Accascina, Palma Bucarelli, Luisa Becherucci, Anna Maria Brizio, Palma Bucarelli, Jole Carnemolla, Anna Maria Ciaranfi Francini, Noemi Gabrielli, Maria Rosa Gabrielli Gagliardi, Maria Krascenicicowa, Costanza Lorenzetti, Caterina Marcenaro, Lina Montalto Tentori, Lisetta Motta Ciaccio, Antonia Nava Cellini, Mary Pittaluga, Giuseppina Soave, Eva Tea, Ornella Tomassoni, Maria Luigia Tosi, Rosanna Tozzi Pedrazzi e Fernanda Wittgens⁴⁹.

In realtà, anche prescindendo dalla straordinaria impresa dell'*Enciclopedia italiana*, sembra di poter dire che, già a partire dal primo dopoguerra, la presenza femminile nei dibattiti e nelle discussioni in campo storico-artistico era destinata a registrare un sensibile incremento rispetto alla fase precedente⁵⁰.

Notevole e sempre più agguerrita, infatti, fu l'attività pubblicistica condotta

⁴⁷ Cfr. A. Cavaterra, *La rivoluzione culturale di Giovanni Gentile: la nascita della Enciclopedia Italiana*, Siena, Cantagalli, 2014.

⁴⁸ C. Gamba, *Un contributo alla costruzione del canone disciplinare: la Storia dell'arte nell'Enciclopedia Italiana e le voci di Adolfo Venturi*, in M. D'Onofrio (ed.), *Adolfo Venturi e la Storia dell'arte oggi*, Modena, Franco Cosimo Panini, 2008, pp. 343-352.

⁴⁹ C. Gamba, *La collaborazione delle storiche dell'arte all'Enciclopedia Italiana Treccani (1925-1938)*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 285-297.

⁵⁰ Cfr. 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; Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-40)*, cit., pp. 110-116; e C. Gamba, *Enciclopedia come Scuola: Anna Maria Brizio e la storia dell'arte nel Grande Dizionario Enciclopedico UTET*

dalle giovani studiose formatesi nella *Scuola di perfezionamento* dell'Università di Roma sulle principali riviste scientifiche e di cultura del settore storico-artistico⁵¹. Non solo «L'Arte», la rivista fondata e diretta da Adolfo Venturi, sulla quale pubblicheranno i primi risultati delle loro ricerche quasi tutte le allieve della *Scuola*, ma anche altre testate d'indiscusso prestigio quali la «Rivista del Reale Istituto di Archeologia e Storia dell'Arte» dell'omonimo istituto romano, «Dedalo. Rassegna d'Arte» di Ugo Ojetti e «La Critica d'Arte» di Carlo Ludovico Ragghianti, per citare solamente le più autorevoli, nonché le pubblicazioni periodiche ministeriali «Bollettino d'Arte del Ministero della Pubblica Istruzione», «Le Arti. Rassegna bimestrale dell'arte antica e moderna» e «Scuola e Cultura», ospiteranno, nel periodo tra le due guerre, un gran numero di articoli e saggi a firma delle giovani studiose⁵².

Si potrebbe aggiungere che, nella seconda metà degli anni Trenta, studiose quali Paola Della Pergola, Mary Pittaluga e Luigia Maria Tosi, formatesi nella *Scuola di perfezionamento* capitolina e divenute in seguito docenti di storia dell'arte nelle scuole secondarie, furono tra le pochissime donne che ebbero parte attiva nel serrato dibattito fra specialisti destinato ad accompagnare la stesura della cosiddetta *Carta della Scuola* (1939) di Giuseppe Bottai, nell'ambito del quale si sarebbero fatte promotrici, dalle colonne di riviste culturali e di bollettini ministeriali, di una serie di organiche e incisive proposte di riordinamento e riforma dell'insegnamento storico-artistico⁵³.

Con l'apertura, all'indomani della riforma Gentile del 1923, del nuovo canale occupazionale dell'insegnamento scolastico, inoltre, molte giovani studiose impegnate in qualità di docenti di storia dell'arte nei Licei si dedicarono per la prima volta, con risultati talora eccellenti, alla stesura di manuali scolastici della disciplina. A titolo puramente esemplificativo, ci limitiamo qui a richiamare il ben noto testo di letture critiche per i licei redatto da Fernanda Wittgens in collaborazione con Paolo D'Ancona, *Antologia della moderna*

(1933-40), in A. Cipriani, V. Curzi, P. Picardi (edd.), *Storia dell'arte come impegno civile. Scritti in onore di Marisa Dalai Emiliani*, Roma, Campisano, 2014, pp. 399-406.

⁵¹ Per un quadro complessivo delle riviste del settore date alle stampe nel corso della prima metà del secolo XX si vedano: G.C. Sciolla (ed.), *Riviste d'arte fra Ottocento ed Età contemporanea. Forme, modelli e funzioni. Atti del convegno (Torino, 2-5 ottobre 2002)*, Ginevra-Milano, Skira, 2003; R. Cioffi, A. Rovetta (edd.), *Percorsi di critica. Un archivio per le riviste d'arte in Italia dell'Ottocento e del Novecento. Atti del Convegno (Milano, Università Cattolica del Sacro Cuore, 30 novembre - 1° dicembre 2006)*, Milano, Vita & Pensiero, 2007; e N. Barrella, R. Cioffi (edd.), *La consistenza dell'effimero. Riviste d'arte tra Ottocento e Novecento*, Napoli, Luciano Editore, 2013.

⁵² Si veda al riguardo il fondamentale spoglio di talune tra le principali riviste italiane del settore meritoriamente condotto da M. Mignini, *Le donne nell'insegnamento della storia dell'arte e nella tutela del patrimonio artistico. Italia e Francia: 1900-1940*, tesi di dottorato discussa all'Università degli Studi di Roma "La Sapienza" in cotutela con l'Université de Lille 3 "Charles De Gualle", a.a. 2004-2005, pp. 371-415.

⁵³ Cfr. Meyer, *Cenerentola a scuola. Il dibattito sull'insegnamento della storia dell'arte nei licei (1900-1943)*, cit., pp. 125-149.

critica d'arte. Letture complementari per l'insegnamento della storia dell'arte nei licei, Milano, Cogliati, 1927; e il vero e proprio manuale compilato dagli stessi studiosi e da Irene Cattaneo, *L'Arte italiana*, Firenze, Bemporad, 1930-1933; il testo di Augusta Ghidiglia Quintavalle, *Storia dell'arte italiana, ad uso dei licei e delle persone colte*, Milano, Società Editrice Dante Alighieri, 1933-1934; quello redatto in collaborazione da Beatrice Serra, Roberto Paribeni e Valerio Mariani su *L'Arte italiana. Manuale per le scuole e per le persone colte*, Torino, Società Editrice Internazionale, 1934-1935; infine, il testo di Mary Pittaluga, *L'Arte italiana. Manuale per i Licei*, Firenze, Le Monnier, 1937-1938⁵⁴.

A questi si potrebbe aggiungere la copiosa serie di manuali disciplinari per le scuole secondarie dati alle stampe tra gli anni Trenta e gli anni Cinquanta da Maria Luisa Gengaro autonomamente o in collaborazione con altri studiosi: Paolo D'Ancona, Maria Luisa Gengaro, *Elementi di storia dell'architettura ad uso dei Regi Licei scientifici*, Firenze, Bemporad, 1937; Maria Luisa Gengaro, *L'arte nella casa e nel costume per le scuole femminili e di magistero professionale per la donna*, Napoli, Morano, 1937; Paolo D'Ancona, Maria Luisa Gengaro, *L'arte nella vita, per le scuole professionali femminili*, Firenze, Bemporad, 1938; Maria Luisa Gengaro, *Cenni sull'arte antica ad uso degli istituti magistrali*, Firenze, Marzocco, 1940; Fernanda Wittgens, Maria Luisa Gengaro, *Testo Atlante di Storia dell'Arte, ad uso dei licei*, Firenze, Marzocco, 1940-42; Paolo D'Ancona, Fernanda Wittgens, Maria Luisa Gengaro, *Storia dell'Arte italiana*, Firenze, Marzocco, 1953⁵⁵.

A coronamento della vera e propria 'traversata del deserto' compiuta dalla prima generazione di storiche dell'arte nella realtà culturale e professionale italiana nel corso della prima metà del Novecento, in tempi relativamente recenti la più autorevole e prestigiosa istituzione culturale della penisola, ossia l'Accademia dei Lincei, ha annoverato per la prima volta tra i suoi soci nazionali una storica dell'arte, la piemontese *Anna Maria Brizio*, l'antica allieva di Lionello e Adolfo Venturi, universalmente riconosciuta come una delle maggiori studiose italiane del settore⁵⁶.

⁵⁴ Sulla prima generazione di manuali scolastici di storia dell'arte per i Licei dati alle stampe all'indomani della riforma Gentile del 1923 si veda ora il documentato contributo di S.A. Meyer, *Per una storia dei manuali scolastici di storia dell'arte nel ventennio fascista (1922-1943)*, «History of Education & Children's Literature», vol. XIX, n. 1, 2024, pp. 323-354.

⁵⁵ È in corso, ad opera di Debora de Gregorio, dottoranda di ricerca dell'Universitat Rovira i Virgili de Tarragona (España), un'organica ricerca sui manuali scolastici di storia dell'arte dati alle stampe nel secondo dopoguerra, i cui primi risultati sono stati presentati nel contributo della stessa de Gregorio, dal titolo *La enseñanza de la Historia del arte en las escuelas italianas: los primeros manuales escritos por mujeres*, al già ricordato seminario internacional «Voces femeninas para una historia del arte militante: relatos y memoria», promosso dal Departament d'Història i Història de l'Art de l'Universitat Rovira i Virgili de Tarragona (España), Tarragona 18-19 dicembre 2024.

⁵⁶ Si veda al riguardo *Anna Maria Brizio*, in *Biografie e bibliografie degli Accademici Lin-*

5. *Adolfo Venturi e i «Tributi femminili alla Storia dell'Arte nell'ultimo ventennio» (1938)*

Ma la comparsa, nel corso della prima metà del Novecento, di una vera e propria generazione di storiche dell'arte sulla scena nazionale trova riscontro soprattutto nella riflessione teorica e nei contributi offerti al rinnovamento degli studi storico-artistici della penisola, ossia nel ruolo tutt'altro che marginale ed episodico esercitato da tale generazione di studiose sul piano scientifico e con riferimento alle ricerche di settore.

A questo proposito, come si è già ricordato, il 24 novembre 1938 Adolfo Venturi tenne al Lyceum romano una conferenza dal titolo *Tributi femminili alla Storia dell'Arte nell'ultimo ventennio*, il cui testo venne dato alle stampe al principio dell'anno successivo⁵⁷. In quell'occasione, il senatore a vita e professore ultraottantenne, si spese un'ultima volta per esaltare i meriti scientifici e sostenere le aspettative professionali delle sue allieve.

Clara Ciruolo, giovane storica dell'arte, allieva di Venturi all'Università di Roma e figlia del senatore a vita Giovanni Ciruolo, in qualità di presidente della sezione «Arte e archeologia» del Lyceum romano aveva invitato lo studioso modenese ad inaugurare una serie di conferenze dedicate alle «donne celebrate nell'arte e nella scienza»⁵⁸. In una lettera del 9 ottobre dello stesso anno, dando notizia a Mary Pittaluga dell'iniziativa, Adolfo Venturi illustrava sinteticamente l'impostazione che si proponeva di dare al suo intervento:

Vorrei discutere del periodo 1915-1930, quando le Facoltà di Lettere erano gremite di donne, prima perché i maschi, negli anni di guerra, non erano a scuola; secondo perché, dopo il 1918, essi si davano a professioni più redditizie. Nel grembo delle Signore erano le umane lettere. E in quel periodo, specialmente negli studi di Storia dell'Arte, le Signore vennero in eccellenza⁵⁹.

Il Lyceum di Roma era un circolo culturale femminile, il quale era sorto nel novembre del 1910, dopo quelli di Firenze e Milano, con l'obiettivo di incoraggiare le donne a dedicarsi agli studi letterari, artistici, scientifici e umanitari⁶⁰.

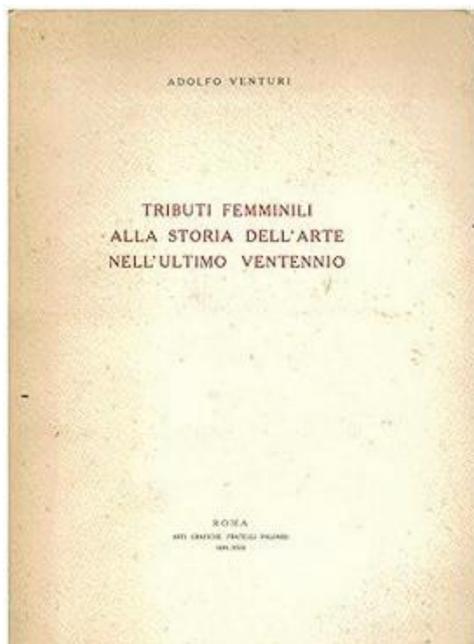
cei, Roma, Accademia nazionale dei Lincei, 1976, pp. 789-791.

⁵⁷ Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit.

⁵⁸ Adolfo Venturi a Mary Pittaluga, Roma 9 ottobre 1938, in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, MP Cart-XXXXVIII-Venturi Adolfo (8 maggio 1917-10 giugno 1941), 226.

⁵⁹ *Ibid.* Per un confronto con le prime allieve di archeologia alla "Sapienza" di Roma si veda C. Piva, *Eloisa Pressi (1883-1946) allieva di Emanuel Löwy a «La Sapienza» di Roma*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 47-72.

⁶⁰ Il Lyceum romano, dal 1934, aveva la sua sede in Piazza Cola di Rienzo, ed era diretto dalla presidente Giannina Franciosi. Cfr. G. Franciosi *et aliae*, *La Donna e il suo nuovo cammino. Conferenze promosse dalla Sezione Insegnamento durante l'inverno del 1918*, Roma, Lyceum Romano, 1919.



Pic. 3. Frontespizio del testo della conferenza tenuta da Adolfo Venturi al Lyceum Romano il 24 novembre 1938 – A. Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, Roma, Palombi, 1939

taluga⁶³; e come sottolineava ancora Elena Berti Toesca, la quale ringraziava Venturi per «questo Suo intervento per noi povere donne davvero a cui viene chiusa anche la faticosa strada degli studi»⁶⁴.

Le informazioni inviate dalle allieve, tra espressioni di profonda modestia e qualche reticenza, permisero a Venturi di comporre un intervento articola-

I Circoli o Lyceum costituivano una rete di relazioni di ambito nazionale e internazionale, essendo associati a quelli fondati in Inghilterra, Francia, Germania, Svizzera, Grecia, Norvegia e Stati Uniti. Si trattava di uno spazio in cui le donne, appartenenti all'aristocrazia e all'alta borghesia della capitale, potevano incontrarsi, conversare e partecipare ad esposizioni d'arte e concerti⁶¹.

In vista della conferenza, tra ottobre e novembre del 1938, Adolfo Venturi contattò diverse delle sue allieve chiedendo loro di fargli pervenire un breve resoconto della loro attività scientifica e un elenco delle pubblicazioni date alle stampe da utilizzare per la stesura del testo del suo intervento⁶².

Dal fitto scambio epistolare tra l'«illustre e caro Maestro» e le giovani studiose emerge la gratitudine per la «benevola e generosa intenzione di parlare di noi, povere donnette», come scriveva con fine ironia Mary Pittaluga

⁶¹ Cfr. «Lyceum» Romano, «Almanacco della Donna Italiana», 1920, p. 278; M. Magri Zoepgni, *Il Lyceum di Roma*, «La Donna italiana. Rivista mensile di lettere, scienze, arti e movimento sociale femminile», vol. VI, 1929, pp. 622-625. M. De Giorgio, *Le italiane dall'Unità a oggi. Modelli culturali e comportamenti sociali*, Bari, Laterza, 1992, pp. 105-107; D. Lippi, *Associazionismo femminile fra Ottocento e Novecento. La storia del Lyceum Club Internazionale di Firenze*, «Rassegna storica toscana», vol. LXIII, n. 2, 2016, pp. 189-224.

⁶² Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-40)*, cit., pp. 154-161.

⁶³ Mary Pittaluga a Adolfo Venturi, s.l. 13 ottobre 1938 in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, Cart-IX,606 – Pittaluga, Mary (15 giugno 1917-4 luglio 1940), VT P2 b036, 44.

⁶⁴ Elena Berti Toesca a Adolfo Venturi, s.l. 24 novembre 1938, citata in Mignini, *Diventare storiche dell'arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-40)*, cit., p. 160.

to, nel quale illustrava sinteticamente il contributo recato alla ricerca storico-artistica dei due decenni precedenti da diciassette storiche dell'arte: Si trattava di Mary Pittaluga, la «prima della degna schiera», seguita da Giulia Sinibaldi, Giusta Nicco Fasola, Anna Maria Brizio, Eva Tea, Maria Gibellino Krasce-ninnicowa, Silvia De Vito Battaglia, Clara Ciruolo, Bianca Maria Arbib e infine dalla «schiera di lavoratrici» composta da Lucia Longhi Lopresti, Vera Giovannozzi Daddi, Anna Maria Ciaranfi Francini, Luisa Becherucci, Elena Berti Toesca, Emma Zocca, Teresa Tozzi Marcianò Agostinelli, Paola della Pergola e Maria Perotti.

Il carattere che potremmo definire «militante» dell'intervento venturiano, pronunciato come sopra detto in un contesto di crescente ostilità nei confronti della presenza delle donne in ambito scientifico e professionale, è confermato dal fatto che il testo venne pubblicato in tempi rapidissimi subito dopo la conferenza e risultava disponibile nella versione stampata già nelle prime settimane del 1939. Una scelta, molto probabilmente sollecitata dallo stesso Venturi, come si evince da una lettera di quest'ultimo a Mary Pittaluga:

Le manderò presto una copia della mia conferenza, che sarà data alle stampe. Spero che la stampa s'affretti, e che io possa mandarLe un esemplare della conferenza. È bene che si stampi, e si diffonda, e faccia pensare ad alcuni che si deve far giustizia⁶⁵.

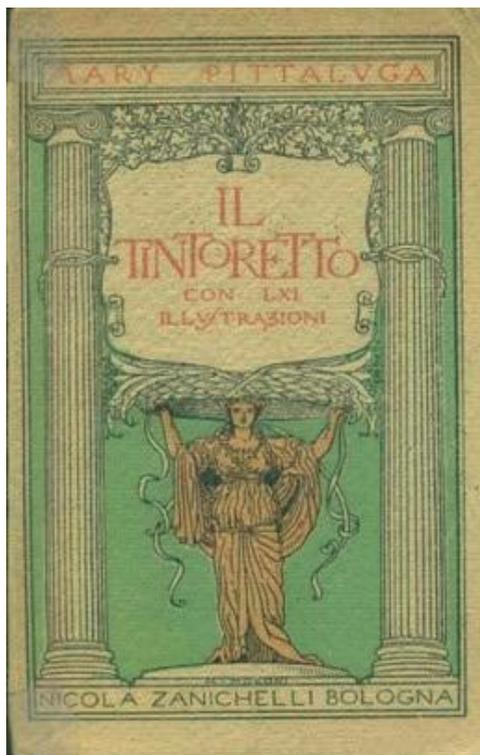
Nei mesi successivi alla conferenza molte allieve inviarono lettere a Venturi per ringraziarlo del suo gesto «cavalleresco» di intervenire in loro difesa. Mary Pittaluga a sua volta, trasmetteva a Venturi il desiderio suo e dell'amica Giulia Sinibaldi, di poter leggere quanto prima il testo dell'intervento:

Con la Giulia si diceva ieri: «Chissà se il Maestro ci manderebbe a leggere la Sua conferenza?». La domanda la giro direttamente a Lei. Ci farebbe molto piacere! Non solo per vedere il suo giudizio a nostro riguardo, ma anche per vedere che cosa Lei à detto di tutte le altre! Conoscere il panorama, attraverso il suo giudizio ultracompetente, dev'essere interessantissimo. Può, Maestro, accontentarci?⁶⁶.

Di fatto Venturi in questa relazione intendeva fare emerge soprattutto, o forse quasi esclusivamente, il contributo «scientifico» recato dalle sue giovani allieve alla storia dell'arte, e dunque la partecipazione delle donne alla ricerca storico-artistica italiana degli ultimi due decenni attraverso la pubblicazione di saggi in riviste specializzate, monografie e cataloghi. Si trattava, come sottolineava con un certo orgoglio patriottico l'anziano studioso, di anni gloriosi

⁶⁵ Adolfo Venturi a Mary Pittaluga, Roma 9 dicembre 1938 Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, MP Cart-XXXXVIII – Venturi Adolfo (8 maggio 1917-10 giugno 1941), 230.

⁶⁶ Mary Pittaluga a Adolfo Venturi, 28 novembre 1938 in Centro Archivistico della Scuola Normale Superiore di Pisa, Archivio Adolfo Venturi, Cart-IX,606 – Pittaluga, Mary (15 giugno 1917-4 luglio 1940), VT P2 b036, 47.



Pic. 4. Frontespizio del volume di M. Pittaluga, *Il Tintoretto*, Bologna, Zanichelli, 1925

per la giovane disciplina, così ricchi «di produzione storico-letteraria, che ha dotato e va dotando l'Italia, grazie anche ai femminili tributi, d'una letteratura abbandonata sino allo scorcio dell'Ottocento agli stranieri, qui ora avvivata dal colore della nostra terra, scaldata dal nostro sole»⁶⁷.

Una simile prospettiva traeva alimento dal più complessivo progetto culturale e scientifico di Venturi, il quale, sin dalla creazione della cattedra universitaria, aveva insistito sulla necessità di un profondo rinnovamento metodologico della ricerca storico-artistica (per segnare la distanza al contempo dall'erudizione locale, dall'estetica dannunziana e dall'insegnamento nelle Accademie di Belle Arti) e sulla necessità che solo delle studiose e degli studiosi rigorosamente formati, ossia forniti di una preparazione universitaria completa e della specializzazione conseguita presso la *Scuola di perfezionamento in storia dell'arte medioevale e moderna* fos-

sero chiamati ad occuparsi della tutela del patrimonio storico-artistico, della direzione dei musei e delle gallerie, dell'insegnamento della disciplina nelle scuole e, ovviamente, nelle università.

Questa premessa rende evidente che l'importanza attribuita da Venturi al «contributo femminile» recato alla ricerca di settore significava evidenziare che le storiche dell'arte da lui formate erano in possesso dell'unico requisito utile e necessario per esercitare, in quanto «abili e pronte al lavoro» come egli scriveva, le diverse professioni dell'ambito storico-artistico.

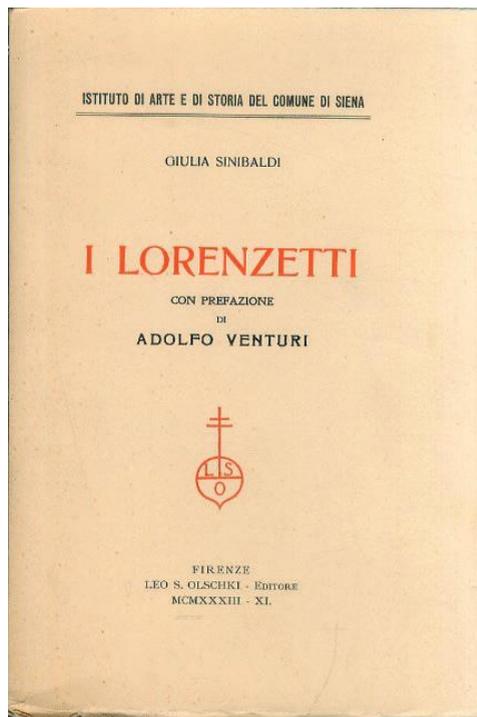
Naturalmente non è possibile in questa sede approfondire in modo organico le biografie intellettuali e lumeggiare il peculiare contributo recato al progresso degli studi storico-artistici da ciascuna delle diciassette studiose citate nella conferenza di Venturi. Ci limitiamo, dunque, ad offrire taluni spunti e riferimenti di carattere generale alla luce dei quali è possibile cogliere nella sua complessità e nelle sue molteplici sfumature la portata ed il più genuino signi-

⁶⁷ Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit., p. 7.

ficato della riflessione proposta dallo studioso modenese nella conferenza del 1938⁶⁸.

Non sorprende, innanzi tutto, che una parte consistente delle pubblicazioni citate da Venturi riguardasse monografie dedicate a singoli artisti, spesso corredate dal catalogo completo delle opere, che rappresentava senz'altro il genere più diffuso della produzione scientifica dei primi decenni del Novecento. In questo tipo di pubblicazioni l'attenzione era focalizzata su un approccio di tipo positivista, ma si può notare una crescente attenzione rivolta all'aspetto psicologico dell'individuo creatore.

Tra le monografie richiamate da Venturi va segnalato in primo luogo *Il Tintoretto* (1925) di Mary Pittaluga, la prima e a lungo l'unica monografia italiana dedicata al pittore veneziano, corredata da un cospicuo numero di tavole e preceduta da una serie di contributi sull'artista veneziano pubblicati nelle più importanti riviste come «L'Arte», «Emporium» e «Dedalo»⁶⁹. Un decennio più tardi la stessa studiosa pubblicò uno studio biografico dedicato a *Masaccio*, recensito anche nelle più importanti riviste tedesche e francesi⁷⁰, studio che secondo Venturi aveva segnato la piena maturità metodologica dell'autrice con la messa in discussione dei principi della *pura visibilità*: «Nella monografia su Masaccio, Mary Pittaluga, dopo contrasti e travagli e dubbi, è



Pic. 5. Frontespizio del volume di G. Sinibaldi, *I Lorenzetti*, Siena, Istituto Comunale d'Arte e di Storia, 1933

⁶⁸ Per una panoramica del contributo femminile alla letteratura artistica dell'Otto e del primo Novecento si vedano C. Marin, *I contributi femminili al dibattito sulle arti dall'Unità d'Italia al Fascismo*, «Annali di Critica d'Arte», vol. IX (2013), pp. 287-300; Ead., *L'Arte delle donne. Per una Kunstliteratur al femminile nell'Italia dell'Ottocento*, Limena (Pd), Libreria Universitaria, 2013.

⁶⁹ M. Pittaluga, *Il Tintoretto*, Bologna, Zanichelli, 1925. Cfr. E. Carrara, *Mary Pittaluga. Verso una biografia intellettuale*, in Carrara, Dragoni (edd.), *Le donne storiche dell'arte tra tutela, ricerca e valorizzazione*, cit., pp. 103-134.

⁷⁰ M. Pittaluga, *Masaccio*, Firenze, Le Monnier, 1935. Da segnalare in particolare la recensione comparativa di Robert Oertel dedicata al testo di Pittaluga e alla coeva monografia di Gertude Wassermann, *Masaccio und Masolino. Probleme einer Zeitenwende und ihre schöpferische Gestaltung*, Strassburg, Heitz, 1935, in «Zeitschrift für Kunstgeschichte», vol. 5, 1936, pp. 65-68.



Pic. 6. Frontespizio del volume di M. Pittaluga, *L'incisione italiana nel Cinquecento*, Milano, Hoepli, 1928

arrivata dunque a chiarire il suo pensiero a sé stessa; e l'opera sua ha raggiunto quella coerenza, che si ottiene soltanto dopo molto faticoso cammino, dopo molto scontento e grandi incertezze»⁷¹.

Una simile rilevanza metodologica era attribuita da Venturi anche alla monografia dedicata nel 1933 ai pittori senesi del XIV secolo Pietro e Ambrogio Lorenzetti da Giulia Sinibaldi, nella quale l'autrice aveva trovato «accordo tra critica e arte»⁷². Nella sua conferenza, inoltre, Venturi richiamava il volume dedicato al Beato Angelico, edito nella *Collezione di monografie illustrate* diretta da Corrado Ricci, da Clara Ciralo e dalla cugina Bianca Maria Arbib, prematuramente scomparsa⁷³; nonché le monografie su *Giambattista Tiepolo* firmata da Silvia de Vito Battaglia nel 1932⁷⁴ e su *Il Beccafumi* di Maria Gibellino Krasceninnicowa⁷⁵.

Si discosta da questa tipologia di pubblicazioni la monografia *L'incisione italiana nel Cinquecento* di Mary Pittaluga⁷⁶, un testo riccamente illustrato dedicato all'arte dell'incisione in Italia tra la fine del XVI e l'inizio del XVII secolo, il cui merito principale stava, come sottolineava Venturi, nella nuova impostazione metodologica «perché l'incisione vi è trattata alla pari della pit-

⁷¹ A. Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit., p. 10. Per la riflessione della studiosa sulla pura visibilità si veda il saggio, sorprendentemente non segnalato da Venturi, della stessa M. Pittaluga, *Pura visibilità e critica d'arte*, «Scuola e Cultura», vol. IX, n. 2, 1933, pp. 178-195.

⁷² G. Sinibaldi, *I Lorenzetti, prefazione di Adolfo Venturi*, Siena, Istituto Comunale d'Arte e di Storia, 1933.

⁷³ C. Ciralo, B.M. Arbib, *Il Beato Angelico. La sua vita e le sue opere, prefazione di Adolfo Venturi*, Bergamo, Istituto Italiano d'Arti Grafiche, 1928. Bianca Maria Arbib, laureatasi in Lettere all'Università di Roma «Sapienza», era divenuta successivamente allieva della *Scuola di perfezionamento*. La morte l'aveva colta prematuramente il 25 ottobre 1926 all'età di ventisei anni. Su di lei: *Necrologio di Bianca Maria Arbib*, «Emporium», vol. 64, n. 382, 1926, p. 272.

⁷⁴ S. De Vito Battaglia, *Giambattista Tiepolo*, Roma, L.U.C.E., 1932.

⁷⁵ M. Gibellino Krasceninnicowa, *Il Beccafumi*, Siena, Istituto Comunale d'Arte e Storia, 1933.

⁷⁶ M. Pittaluga, *L'incisione italiana nel Cinquecento*, Milano, Hoepli, 1928 (2ª ediz.: 1930).

tura, con i criteri in uso per qualsiasi opera d'arte e non secondo l'atteggiamento tecnicista biografico, più consueto in materia di stampe». La pubblicazione si inseriva in un interesse più ampio e articolato per l'arte incisoria, coltivato dalla studiosa fiorentina anche nel secondo dopoguerra, il quale ha reso Pittaluga una pioniera nello studio delle stampe⁷⁷.

Uno dei campi di ricerca più frequentati dagli studiosi e studiose italiani e stranieri tra le due guerre riguardava comunque l'arte dei *primitivi*. Con la citata monografia *I Lorenzetti* Giulia Sinibaldi si era accreditata come esperta della pittura toscana del Duecento e Trecento, tanto che le venne affidata la compilazione delle schede del catalogo della grande *Mostra giottesca* allestita a Firenze nel 1937 per celebrare i 600 anni dalla morte dell'artista⁷⁸. Il vasto catalogo che comprendeva le schede delle oltre trecento opere esposte per l'uso del pubblico fu in seguito predisposto dalla Sinibaldi, con la collaborazione dell'amica Giulia Brunetti, per la pubblicazione del prestigioso volume *Pittura italiana del Duecento e Trecento. Catalogo della mostra giottesca di Firenze del 1937*, stampato da Sansoni nel 1943⁷⁹. La mostra fiorentina e il primo catalogo del 1937 avevano costituito un'occasione preziosa, osservava Adolfo Venturi, per approfondire la conoscenza della pittura del Duecento:

La mostra giottesca a Firenze – egli scriveva – è stata una magnifica occasione di studio, colta da Giulia Sinibaldi, che ha saputo vedere chiari i rapporti tra un artista e l'altro, tra una scuola e l'altra, meglio intuire lo sviluppo della vita di ciascuna scuola, quasi per uno schema immaginario, dove poche opere tra larghe lacune mostrano una palese continuità di gusto o mutamenti spiegabili. Così, per l'Arte, il glorioso Dugento, generatore del primo Rinascimento italiano, sempre più si chiarirà sul leggìo della storia; si chiariranno i più efficaci moti spirituali del Dugento, nei quali Dante si formò⁸⁰.

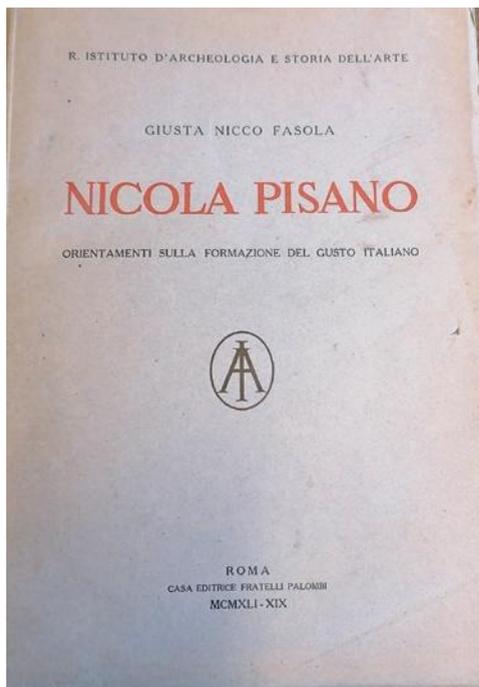
Nella sua conferenza, lo studioso modenese dedicava ampio spazio anche agli studi che Giusta Nicco Fasola, allieva di Lionello Venturi all'Università di Torino, aveva dedicato allo scultore romanico Nicola Pisano e che sarebbero in seguito confluiti nel volume *Nicola Pisano. Orientamenti sulla formazione del gusto italiano*, pubblicato solo nel 1942. Si tratta di un'opera critica monumentale, corredata da un cospicuo numero di riproduzioni fotografiche realizzate appositamente per la pubblicazione, la quale proponeva una complessa

⁷⁷ La studiosa tenne corsi liberi di Storia dell'illustrazione e dell'incisione presso l'Università di Firenze almeno fino all'anno accademico 1938-1939. Sull'interesse di Pittaluga per la storia dell'incisione si veda Carrara, *Mary Pittaluga. Verso una biografia intellettuale*, cit., pp. 109-110.

⁷⁸ *Mostra giottesca. Palazzo degli Uffizi, aprile-ottobre MCMXXXVII-XV*, Bergamo, Istituto Italiano d'Arti Grafiche, 1937. Si veda al riguardo A. Monciatti, *Alle origini dell'arte nostra. La 'Mostra giottesca' del 1937 a Firenze*, Milano, Il Saggiatore, 2010, p. 33.

⁷⁹ *Pittura italiana del Duecento e Trecento. Catalogo della Mostra giottesca di Firenze del 1937*, a cura di G. Sinibaldi e G. Brunetti, Firenze, Sansoni, 1943. Cfr. Monciatti, *Alle origini dell'arte nostra*, cit., pp. 142-148.

⁸⁰ Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit., p. 13.



Pic. 7. Frontespizio del volume di G. Nicco Fasola, *Nicola Pisano. Orientamenti sulla formazione del gusto italiano*, Roma, Palombi, 1941

Tra i pochi studi dedicati ad artisti o fenomeni artistici non italiani, Venturi menziona quasi di sfuggita un contributo sulle stampe cinesi di Lucia Lopresti pubblicato su «L'Arte»⁸³, gli studi dedicati all'«arte patria» della sua allieva russa Maria Gibellino Krasceninnicowa⁸⁴ e le ricerche di Giusta Nicco Fasola sul pittore tedesco, «antiaccademico, realista a oltranza, mistico, drammatico, simbolista» Mathias Grünewald⁸⁵.

La più rilevante e incisiva apertura all'arte straniera era tuttavia rappresen-

reinterpretazione dell'opera di Nicola Pisano e del suo ruolo nella nascita dell'arte italiana⁸¹, questioni lungamente discusse per via epistolare con Adolfo Venturi che nella conferenza del 1938 commentava:

Orientarci nello studio di Nicola Pisano, che lavorava quando l'arte e la cultura medievale si andavano differenziando nelle individualità nazionali, e quando, per noi, questo processo era più attivo e necessario, significa orientarci anche sulla formazione e sull'indirizzo del gusto italiano. Il momento in cui Nicola operò è uno dei più vivi di tutta la nostra storia; si elaboravano allora la nostra lingua, la poesia, la religione, il sentimento nazionale⁸².

Alla considerevole importanza attribuita dai contributi di questa prima generazione di storiche dell'arte della scuola venturiana alle ricerche intorno sulle radici medievali dell'arte nazionale italiana corrisponde una limitata attenzione (riscontrabile in tutta la ricerca dell'epoca) all'arte straniera.

⁸¹ G. Nicco Fasola, *Nicola Pisano. Orientamenti sulla formazione del gusto italiano*, Roma, Palombi, 1941. Si veda al riguardo Massarente, *Giusta Nicco Fasola e la storia dell'arte a Genova*, cit., pp. 247-248.

⁸² Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit., p. 15.

⁸³ L. Lopresti, *Una raccolta di xilografie cinesi*, «L'Arte», vol. 24, n. 1, 1921, pp. 29-33. Si tratta di una breve illustrazione di stampe cinesi, esito delle lezioni sulla Storia della pittura cinese tenute da Giovanni Vacca nella Scuola Orientale dell'Università di Roma.

⁸⁴ Maria Gibellino Krasceninnicowa, *Storia dell'arte russa*, Roma, Maglione, 1935-1937, 2 voll. Cfr. A. Amendola, «Venerato e caro maestro». *Maria Krasceninnicowa, Adolfo Venturi e la storia dell'arte russa in Italia*, «Annali di Critica d'Arte», vol. 10, 2014, pp. 257-282.

⁸⁵ G. Nicco Fasola, *L'Arte di Mathias Grünewald nella critica*, «L'Arte», vol. 34, n. 3, 1931, pp. 377-397; Ead., *Per l'interpretazione dell'arte di Mathias Grünewald*, «L'Arte», vol. 35, n.

tata dall'opera dedicata all'arte europea dell'Ottocento e del Novecento che Anna Maria Brizio, allieva di Lionello Venturi e libera docente all'Università di Torino dal 1930, avrebbe pubblicato nel 1939⁸⁶. Il volume, annunciato con enfasi e con parole di profondo apprezzamento da Adolfo Venturi nella conferenza del 1938, faceva parte della collana «Storia dell'arte classica e italiana» curata per i tipi dell'Unione Tipografico-Editoriale Torinese (UTET) da Pietro Toesca e Giulio Emanuele Rizzo. Si trattava della prima sintesi data alle stampe in Italia sull'arte europea dal Neoclassicismo fino al Postimpressionismo, culminante con un capitolo dedicato, come anticipava Adolfo Venturi, alla «nuova architettura, con l'America che viene in campo, nella grande attività edilizia, nell'entusiasmo di rinnovamento, nei tentativi e nelle ricerche, forse più vivamente sentite dall'arte moderna»⁸⁷.

Il volume risultava a tutti gli effetti talmente innovativo e così distante dalla celebrazione fascista del 'genio italico' in campo artistico da suscitare forti polemiche e reiterati attacchi nei riguardi dell'autrice, nonché da contribuire al suo provvisorio allontanamento dall'insegnamento universitario⁸⁸. Nel 1946 tuttavia, come si è già ricordato, Anna Maria Brizio sarebbe divenuta la prima professoressa ordinaria della disciplina presso un'università italiana, andando a ricoprire, sulle orme del suo antico maestro Lionello Venturi, la cattedra di storia dell'arte presso la Facoltà di Lettere e Filosofia dell'Università di Torino.



Pic. 8. Frontespizio del volume di A.M. Brizio, *Ottocento, Novecento*, Torino, Unione Tipografico-Editrice Torinese (UTET), 1939

2, 1932, pp. 200-220; Venturi, *Tributi femminili alla storia dell'arte nell'ultimo ventennio*, cit., p. 14.

⁸⁶ A.M. Brizio, *Ottocento, Novecento*, Torino, Unione Tipografico-Editrice Torinese (UTET), 1939.

⁸⁷ Venturi, *Tributi femminili*, cit., p. 20; Cfr. M.G. Leonardi, «Ottocento Novecento» di Anna Maria Brizio: varianti critiche e redazionali (1939-1944-1962), «Annali della Scuola Normale Superiore di Pisa. Classe di Lettere e Filosofia», vol. 3, n. 2, 2011, pp. 527-552.

⁸⁸ Cfr. M. Dalai Emiliani, *Anna Maria Brizio dalla formazione all'insegnamento milanese*, «Raccolta Vinciana», vol. 39, 2021, pp. 5-12.

Conclusioni

Nel concludere il nostro intervento riteniamo, infine, doveroso fare un sia pur rapido cenno alla ‘memoria’ che oggi in Italia si conserva di quella prima generazione di storiche dell’arte affermatasi a patire dal ventennio fascista e poi nel secondo dopoguerra. Sembra di poter dire al riguardo, che, fuori dalle cerchie degli addetti ai lavori e fatta eccezione per gli studi specialistici – che, fra l’altro, hanno dedicato loro un minimo di attenzione solo molto recentemente –, la ‘memoria’ di tali studiose, così come la conoscenza dell’itinerario umano e scientifico della maggior parte di esse, non hanno trovato che un modestissimo riscontro.

Del tutto inesistenti, ad esempio, risultano essere le storiche dell’arte da noi prese in considerazione per quello che è il più autorevole e organico strumento di conservazione della memoria delle grandi personalità della storia nazionale, ossia il *Dizionario Biografico degli Italiani* (DBI), il quale contiene a tutt’oggi un solo profilo biografico della folta schiera di studiose: quello di *Lucia Lopresti*, la moglie di Roberto Longhi, nota al grande pubblico come scrittrice e critica letteraria con lo pseudonimo di *Anna Banti*, della quale è quasi esclusivamente ricordata l’opera narrativa e saggistica in ambito letterario.

Decisamente più numerosi, ma ancora largamente insufficienti e non sempre rigorosi e affidabili dal punto di vista della correttezza e della completezza delle informazioni contenute, sono i profili biografici delle storiche dell’arte accolti sulla popolare *Wikipedia*⁸⁹, che assommano a circa una decina sul totale delle 99 studiose facenti parte del campione da noi preso in considerazione⁹⁰.

Come si è accennato, del resto, solo in tempi recenti la stessa comunità degli storici dell’arte ha cominciato a manifestare un reale interesse per questa prima generazione di studiose del settore e ha dedicato loro una serie di ricerche e di studi, recuperando una gran messe di documenti (carteggi, scritti, immagini ecc.) sulla presenza femminile in ambito storico-artistico nel corso della prima metà del Novecento a lungo trascurati o del tutto ignorati dalla storiografia precedente⁹¹. La raccolta di studi data alle stampe nell’autunno 2022 in un fascicolo speciale della rivista «Il Capitale Culturale» dal titolo «Le donne storiche dell’arte tra tutela, ricerca e valorizzazione», frutto di due convegni di studi sullo stesso tema celebrati a Macerata e a Genova rispettivamente il 28-29 aprile e il 26-27 maggio 2022⁹², costituisce un primo importante segnale

⁸⁹ Cfr. C. Ortolani, *Wikipedia. L’enciclopedia sul Web*, Pordenone, Ialweb, 2007.

⁹⁰ Si tratta di Luisa Becherucci, Lidia Bianchi, Anna Maria Brizio, Palma Bucarelli, Noemi Gabrielli, Augusta Ghidiglia Quintavalle, Caterina Marcenaro, Mary Pittaluga, Eva Tea e Fernanda Wittgens.

⁹¹ L’unica eccezione è costituita dal pionieristico e fondamentale contributo di Mignini, *Diventare storiche dell’arte. Una storia di formazione e professionalizzazione in Italia e in Francia (1900-40)*, cit., al quale abbiamo più volte fatto riferimento nel corso della nostra ricostruzione.

⁹² Carrara, Dragoni (edd.), *Le donne storiche dell’arte tra tutela, ricerca e valorizzazione*,

di quella che sembra rappresentare una sorta di auspicabile e opportuna inversione di tendenza rispetto al passato.

Sulla scia di tale iniziativa, del resto, è stata recentemente avviata una nuova *call for papers* ed è stato annunciato un ulteriore incontro di studi a Roma, per il 24-25 maggio 2025, dal titolo «Le donne critiche d'arte e storiche dell'arte», ideato da E. Carrara, P. Dragoni, C. Lollobrigida e I. Miarelli Mariani ed organizzato dagli atenei di Genova e Macerata in collaborazione con la University of Arkansas (Roma Program) e con i Musei Civici di Roma.

The history of the characters of Albanian literature for children

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ABSTRACT: The history of Albanian children's literature has passed through different literary periods during its development. Initially, religious texts of medieval literature were used as such literature in schools, but pure children's fiction was born during the period of Albanian Romanticism, to continue further through the literary periods of Critical Realism, Sentimentalism, Symbolism, Social Realism, up to the current of post-modernism. During its development, we sometimes see this literature with religious ideas, sometimes with national ideas, sometimes with strong social criticism, sometimes with efforts to create gender equality, sometimes with left communist ideas. Thus, Albanian children's literature changed over time in its goals, changed in its artistic and ideological commitments: Albanian children's literature during its development was used not only for artistic effects, but it was often used by ideologues as a powerful tool for conveying various political, cultural, ideological, religious, and patriotic ideas to children. So, during its history, Albanian children's literature had not only an artistic role but also a social, economic, and political role. As such, children's literature has been an inseparable part of the political and cultural changes in Albania.

EET/TEE KEYWORDS: Children's Literature; Character; Albanian; Modern history. XIV-XIX Centuries.

1. *History of the character of Albanian children's literature*

The history of the development of Albanian children's literature is an overview that shows the cultural changes that Albanian culture has gone through since the Middle Ages, when Albanian writing began, until modern times. The cultural changes were also reflected in the characters of this literature, which built the characters in accordance with the ideas of the period, in accordance with its social function. Thus, in Albanian children's literature, there are religious characters during the Middle Ages, national characters during Romanti-

cism, social characters during Critical Realism, communist characters during the literature of Social Realism, to contemporary literature where there is a great heterogeneity of characters representing the different aesthetic principles of the authors of this literary period.

Albanian children's literature began as literature engaged with biblical religious ideas. Although this literature was addressed to children, it did not differ from adult literature in terms of language, ideas, and artistic construction of the text. The literature of the Middle Ages did not have play, or entertainment as part of it, but treated the themes of God, the day of judgment, the punishment of unbelievers, and the reward of believers with great seriousness¹. Albanian children's literature was just as serious during Romanticism when it dealt with issues of the Albanian nation, of its captivity, of the war that must be done to liberate the homeland². Also, the literature of Socialist Realism has not adapted to the world of children, since this literature dealt with issues of communist ideology with which the communist state intended to indoctrinate children and distance them from the Albanian tradition. Albanian literature later began to adapt to the mentality of children, their demands, and their desires and gave its educational message through stories adapted to children's minds. This adaptation to the world of children in Albanian literature was not achieved quickly, it lasted for about five centuries. Albanian children's literature developed gradually, benefiting from the development of other psychological and sociological fields, which have gradually come to know the world of children better. The results of these fields were used by Albanian children's literature to better adapt to the children's world as close as possible to our time. During the development of Albanian children's literature, texts loaded with ideological ideas have been particularly problematic, which have strengthened their level of ideas: such literary texts for children, concentrating too much on biblical, national, and communist ideas, have left aside the children's world, their language, their mentality.

The characters in Albanian children's literature were mostly children. However, these characters have not been the same in each period. So, in literature burdened with religious ideas, national ideas, or communist ideas, children behave like adults, they think deeply and make sharp judgments about religious topics, about the dogmas of faith. Only in periods in which the plane of ideas of the text was not strong, there are child characters who behave like children, who deal with children's preoccupations, and their world.

Animal characters have been present in Albanian children's literature since Romanticism. By telling stories with animal characters, the fable has man-

¹ L. Matrënga, *La Dottrina Cristiana*, Vatican, Biblioteca Apostolica Vaticana, 1964, pp. 11-13.

² N. Frashëri, *E këndimit çunavet këndonjëtoreja II* [*Reading Book for Children II*], Bukuresht, Drita, 1886, p. 47.

aged to deliver a message with a powerful impact on children. In addition to animals, fables in Albanian children's literature also had characters of birds, plants, and heavenly bodies. The allegorize character of animal characters is not the same in all periods of Albanian literature: animal characters have national characteristics in the literature of Romanticism, they have social characteristics in the literature of Critical Realism, they have symbolic characteristics in the literature of Symbolism, they have communist characteristics in the literature of Socialist Realism. So, the characters of fables get their moral and ethical characteristics, depending on the socio-cultural characteristics of the literary period in which they are found.

The characters of Albanian children's literature continued to increase in variety. Thus, in the old literature, there were mainly religious characters from the Bible and the Qur'an. During Romanticism, fictional characters for children and adults are encountered for the first time, as well as animal characters are encountered for the first time. The types of characters continued to increase in subsequent literary periods, giving characters who differ in age, gender, language, cultural backgrounds, professions, nations, and their inner worlds. Thus, during its development, Albanian children's literature was enriched with different types of characters, which present people from different stages of life, giving different nuances of the reality of life that children encountered during their lives.

2. *Characters of religious Albanian literature*

During the Middle Ages, the Albanian countries belonged to the Catholic faith. In the 14th century, the Albanian countries were conquered by the Ottoman Empire and remained part of this empire for the next five centuries. During the time of the Ottoman occupation, great cultural, religious and political changes took place among the Albanians. The cultural changes were more noticeable when a part of the Albanian population began to change their faith and converted from the Catholic religion to the Islamic religion. The cultural changes were more noticeable when a part of the Albanian population began to change their faith and converted from the Catholic religion to the Islamic religion. During this time, two types of literature were written; 1) literature with biblical motifs³ which was written by priests who tried through literature to influence the Catholic population to stop their conversion to Islam; 2) social literature⁴ which was written by Muslims and artistically narrated

³ S. Hamiti, *Letërsia flobiblike, letërsia romantike* [Philo-biblical literature, romantic literature], Prishtinë, Faik Konica, 2002, p. 19.

⁴ *Ibid.*, p. 21.

Islamic events and characters. Thus, used as children's literature the poems with biblical elements by Lekë Matrënga (1567-1616) and Jul Variboba (1725-1788)⁵, but also the social poems with Islamic elements by Muhamed Kyçyku (1784-1844)⁶. These two old Albanian literatures, even though they were read by children and used by them as school textbooks⁷, are not adequate literature for children: there is no play or humor in them, and they were not written with a language suitable for the young age of children.

The old children's literature with biblical motifs was called Philobiblical Literature⁸ and was written during the XVI-XVIII centuries. This literature artistically recounts events from the Old Bible and the New Bible, recounting events from the lives of the prophets as well as from the life of Jesus Christ. Characters of this literature are biblical characters such as Adam, Eve, Noah, Abraham, Jacob, Moses, and Jesus⁹. These characters of the old Albanian literature are limited within their biblical schemes and are characters that are not used to tell new stories, they are not used to give personal ideas of the authors: the characters of the old Albanian literature do not act, do not think, do not talk about something new from what they do in the Bible.

Biblical characters in old Albanian literature, in addition to the artistic segment, also have a didactic segment, given that in this literature they are propagandists of the Catholic religion: biblical characters propagate faith in Jesus Christ, and propagate the piety that Catholic believers should have in the Christian religion. Authors priests, through such biblical characters, tried to influence the faith of Albanian children, in order for the children's devotion to the Catholic religion to be as great as possible. Old Albanian literature with biblical motifs was religiously engaged literature and served for religious indoctrination of child readers, therefore the moralizing segment in this literature was very strained.

In the Albanian culture, during the XVIII-XIX centuries, children's literature with social motives was also written, which was written by the Muslim part of the Albanian population, and this literature recounted events from the Qur'an. The characters of this literature were the Quranic characters like Ibrahim, Nuh, Musa, Yusuf, and Muhamed¹⁰. Especially the Qur'anic story of Yusuf was narrated artistically as children's literature¹¹. These characters have

⁵ A. Deva, *Poezia shqipe për fëmijë 1872-1980 [Albanian poetry for children 1872-1980]*, Prishtinë, Rilindja, 1982, p. 30.

⁶ M. Hysa, *Autorë dhe tekste nga letërsia e vjetër shqiptare II [Authors and texts from old Albanian literature II]*, Shkup, Flaka e vëllazërimit, 1995, p. 181.

⁷ *Ibid.*

⁸ Hamiti, *Letërsia filobiblike, letërsia romantike [Philo-biblical literature, romantic literature]*, cit., p. 19.

⁹ P. Bogdani, *Çeta e profetëve [The group of prophets]*, Prishtinë, Rilindja, 1986, p. 491.

¹⁰ M. Kyçyku, *Jusufi e Zulejhaja [Yusuf and Zulaikha]*, Shkup, Vatra, 2002, p. 13.

¹¹ Hysa, *Autorë dhe tekste nga letërsia e vjetër shqiptare II [Authors and texts from old Albanian literature II]*, cit., p. 181.

more social characteristics of the Albanian life of the XVII-XVIII centuries: the Quranic characters of this literature were not used for religious indoctrination of children, but they were used to allegorically give social messages about the reality of the time, the difficulties of life, and the problems of state administration¹².

3. *Characters in children's literature of Romanticism*

Authentic Albanian children's literature was born in Romanticism. The first children's literature books were written to serve Albanian students in the Albanian primary schools that were opened during this time. In addition to earlier religious literature that had religious characters of adult age, the literature of Romanticism was for the first time dominated by characters who were irreligious and who were children.

Albanian children's literature of Romanticism was written in the genre of short stories, fables, and poems, which have as their subject the lesson, the right development of the child, his good behavior in the family and society, his good behavior towards nature and animals. To reach this level, the characters of Romanticism literature are children who learn: they are curious to know history and natural knowledge, they are curious to know how life, family, and society work, and they want to know what is good and what is bad. However, the characters of the literature of Romanticism do not choose the ways of play, humor, and entertainment, which are the most suitable forms to influence children. In the literature of Romanticism, a lesson was reached through the dedication of child characters very seriously to knowledge, and their dedication very seriously to research. Therefore, the characters of the Albanian children's literature of Romanticism are very serious, sober, studious children, diligent in their studies, who convey life and its problems with the dedication of the researcher who learns from every detail of life.

Next to the child characters, the children's parents are the most frequently encountered characters in this literature. Parents are also very devoted and demand that children take life seriously, therefore they react to any inappropriate behavior that children do: parents wonder how their child damaged a flower in the park¹³, how they broke the mirror¹⁴. Parents are also very devoted and demand that children take life seriously, therefore they react to any inappropriate

¹² Hamiti, *Letërsia filobiblike, letërsia romantike* [Philo-biblical literature, romantic literature], cit., p. 21.

¹³ N. Frashëri, *E këndimit çunavet këndonjëtojeja I* [Reading Book for Children I], Buresht, Dritë, 1886, p. 39.

¹⁴ *Ibid.*, p. 12.

behavior that children do: parents worry because their child has damaged a flower in the park¹⁵, or because their child has broken a mirror¹⁶.

Adult characters in the literature of Romanticism serve to direct children's conversation towards a certain problem, therefore children in literary units are accompanied by their mother¹⁷, father¹⁸, uncle¹⁹, grandfather²⁰, friend²¹, wise old man²². Adult characters explain problems to children, and solve puzzles for them, always being at the service of the children's world. So, the child characters in this literature with the help of adults learn from their mistakes²³, learn from the harmony that exists in nature²⁴, learn from the advice of adults²⁵.

The number of characters in each unit of the literature of Romanticism is small. However, the authors of this literature have connected the literary units among themselves, and from one literary unit to another they add a variety of characters, so that the child readers while reading gradually learn about the complexity of life, about the different social groups with which they are surrounded: in the literature of Romanticism there are characters of different genders²⁶, of different ages²⁷, of different professions²⁸, of different nations²⁹, as well as of different religions³⁰.

To inspire children readers for good deeds, to direct them towards good and useful deeds for the family, for the circle, and for society in general, the literary units of Romanticism have a positive approach to positive characters and a negative approach to negative characters. Children in these units are motivated to be humane and generous with others like the heroes of these units³¹, to be loving like them³², caring³³, who love people³⁴, love animals³⁵, love na-

¹⁵ *Ibid.*, p. 39.

¹⁶ *Ibid.*, p. 12.

¹⁷ *Ibid.*, p. 14.

¹⁸ *Ibid.*, p. 11.

¹⁹ *Ibid.*, p. 13.

²⁰ *Ibid.*, p. 9.

²¹ *Ibid.*, p. 31.

²² *Ibid.*, p. 23.

²³ *Ibid.*, p. 5.

²⁴ *Ibid.*, p. 3.

²⁵ *Ibid.*, p. 23.

²⁶ N. Frashëri, *E këndimit çunavet këndonjëtoreja II* [Reading Book for Children II], Bukuresht, Dritë, 1886, p. 36.

²⁷ Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 19.

²⁸ *Ibid.*, p. 33.

²⁹ *Ibid.*, p. 42.

³⁰ *Ibid.*, p. 18.

³¹ Id., *Abetare e gjuhësë shqipe* [Albanian language primer], Bukuresht, Dritë, 1886, p. 58.

³² *Ibid.*, p. 58.

³³ Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 5.

³⁴ *Ibid.*, p. 8.

³⁵ *Ibid.*, p. 53.

ture³⁶, children are motivated to be loyal like the heroes of Romanticism³⁷, to have self-confidence like them³⁸, to learn in school like them³⁹. Authors of literature of Romanticism have chosen in their units characters who are optimistic⁴⁰, who learn at school⁴¹, who love their mother and father at home⁴², love nature⁴³ and through such characters they aimed to bring a positive spirit to child readers. The characters of literature of Romanticism are far from any evil work or any evil thought. In this way, the characters of the literary units of Romanticism are more characters sketched as positive, without their inner human world where good and evil met: the characters of Romanticism literature are simple, uniform, without meditations, and without the world of their internal.

The characters of literature of Romanticism are far from any evil work or any evil thought. These characters do not have a certain age, just as they do not have proper names, but general ones: they are called the boy⁴⁴, the old man⁴⁵, the mother⁴⁶, the father⁴⁷, the little ones⁴⁸, the son⁴⁹, the daughter⁵⁰, the lame man⁵¹, the traveler⁵².

The Albanian community belonged to the Catholic faith and the Islamic faith, and the authors of Albanian Romanticism built children's literature with characters from both faiths. In Romanticism children's literature, there are characters of the Islamic faith, such as Ali⁵³, Kamber⁵⁴, Hasan and Hysen⁵⁵, dervish⁵⁶, Fatima⁵⁷, Ahmet⁵⁸, but there are also characters of the Catholic

³⁶ S. Frashëri, *Abetare e gjuhës shqipe* [Albanian language primer], cit., p. 58.

³⁷ N. Frashëri, *E këndimit çunavet këndonjëtoreja II* [Reading Book for Children II], cit., p. 47.

³⁸ Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 13.

³⁹ *Ibid.*, p. 3.

⁴⁰ *Ibid.*, p. 8.

⁴¹ *Ibid.*, p. 3.

⁴² S. Frashëri, *Abetare e gjuhës shqipe* [Albanian language primer], cit., p. 57.

⁴³ *Ibid.*, p. 58.

⁴⁴ N. Frashëri, *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 13.

⁴⁵ *Ibid.*, p. 23.

⁴⁶ *Ibid.*, p. 5.

⁴⁷ *Ibid.*, p. 11.

⁴⁸ *Ibid.*, p. 14.

⁴⁹ *Ibid.*, p. 24.

⁵⁰ *Ibid.*, p. 11.

⁵¹ *Ibid.*, p. 30.

⁵² *Ibid.*, p. 31.

⁵³ *Ibid.*, p. 19.

⁵⁴ *Ibid.*, p. 20.

⁵⁵ *Ibid.*, p. 19.

⁵⁶ *Ibid.*, p. 48.

⁵⁷ *Ibid.*, p. 19.

⁵⁸ Id., *E këndimit çunavet këndonjëtoreja II* [Reading Book for Children II], cit., p. 6.

faith, such as Christ⁵⁹, the Priest⁶⁰. The romantics tried to unify the Albanian nation, therefore they narrated stories where the characters were people of different faiths who lived in Albanian society in harmony with each other, a society which has mutual understanding between believers of different religions, where there is no enmity and no hatred between them.

The fable began to be written for the first time in the literature of Albanian Romanticism and in this literature the characters of animals and birds are encountered for the first time. The animal characters represent people with different characters: the wolf represents the aggressive man⁶¹, the dog represents the loyal man⁶², the horse represents the helpful friend⁶³, the fox represents the cunning man⁶⁴. However, the characteristics of the animal characters of this literature are connected with the problems of the time, with the creation of the Albanian state, with its slavery, with its fight for freedom, so the animal characters represent the characteristics of Albanians in the 19th century: the wolf has the characteristics of the conqueror who puts the captive «down»⁶⁵; the horse represents the helpful friend⁶⁶, which protects the Albanian from enemies; the fox represents the cunning and ungrateful man «as the conqueror»⁶⁷. The presence of animal characters in the literature of Romanticism is proof that in this period of Albanian literature, allegory began to be used: in this literature, through animals, their actions, behaviors, hatred, love, and betrayal, in an allegorical form was built the national theme of Albanian Romanticism.

4. *Characters of children's literature of Critical Realism*

Critical Realism as a literary period entered Albanian literature after the independence of Albania (1912). Critical Realism brought a critical discourse in Albanian literature, criticizing the defects of Albanian life, Albanian society, and the Albanian state, with the aim of this literature influencing the improvement of Albanian society and the state. Authors of Critical Realism such as Ndre Mjedja (1866-1937), Çajupi (1866-1930), Noli (1882-1965), and Migjeni

⁵⁹ Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 18.

⁶⁰ *Ibid.*, p. 35.

⁶¹ Id., *Vjersha për mësonjëtorët të para* [Vjersha për shkollat të para], Bukuresht, Dritë, 1886, p. 53.

⁶² Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 15.

⁶³ *Ibid.*, p. 31.

⁶⁴ Id., *Vjersha për mësonjëtorët të para* [Vjersha për shkollat të para], cit., p. 42.

⁶⁵ *Ibid.*, p. 53.

⁶⁶ Id., *E këndimit çunavet këndonjëtoreja I* [Reading Book for Children I], cit., p. 31.

⁶⁷ Id., *Vjersha për mësonjëtorët të para* [Vjersha për shkollat të para], cit., p. 42.

(1911-1938), criticizing the vices of the Albanian environment, tried to build an ideal Albanian society, without moral and economic problems, without corruption, nepotism, and without absolutism in governance.

Children's literature of Critical Realism dealt with social issues that affect the poverty of Albanian society, lack of education, lack of health care, gender inequality, and the plight of Albanian women. To build these themes the authors used characters suitable for each theme which are the best illustrators of the themes. Thus, one of the main themes of this literature is work, because the authors of this period thought that through work Albanians regulate the difficult situation of Albanian society. The characters encountered in the units with the theme of work are the boatman⁶⁸, the worker⁶⁹, the sailor⁷⁰, the shepherd⁷¹, the farmer⁷². In the literary units with the theme of poverty, poor, miserable characters are encountered⁷³, such as the beggar⁷⁴, the miserable old man⁷⁵, the poor⁷⁶, the orphan⁷⁷, trying the authors of this period to present the theme of poverty from the position of the characters who experience poverty on their backs. From their position, the Albanian world is given, its defects, social vices, false social morality, avarice. Whereas, the literary units that deal with the theme of women have female characters of different ages and places, such as the mountaineer⁷⁸, the girlfriend⁷⁹, the grandmother⁸⁰, mother⁸¹, daughter⁸², wife⁸³.

Characters from this period are also found in other periods of Albanian literature, but while in other periods they have national characteristics (Romanticism), symbolic characteristics (Symbolism), and communist characteristics (Socialist Realism), what makes them special these characters in the literature of Critical Realism is their social character, which makes the same characters appear in this period with new characteristics. Thus, both the external appearance of the characters of Critical Realism and their inner world are at the service of social themes. The clothing of the characters is poor, with

⁶⁸ N. Mjedja, *Guxo [Dare]*, Tiranë, Naim Frashëri, 1953, p. 8.

⁶⁹ *Ibid.*, p. 22.

⁷⁰ *Ibid.*

⁷¹ *Ibid.*, p. 20.

⁷² *Ibid.*, p. 19.

⁷³ A. Bishqemi, *Historia e letërsisë shqipe për fëmijë [The history of Albanian children's literature]*, Elbasan, Sejko, 2001, p. 108.

⁷⁴ Migjeni, *Prozë [Prose]*, Prishtinë, Rilindja, 1977, p. 42.

⁷⁵ Mjedja, *Guxo [Dare]*, cit., p. 12.

⁷⁶ *Ibid.*, p. 14.

⁷⁷ *Ibid.*

⁷⁸ *Ibid.*, p. 10.

⁷⁹ *Ibid.*, p. 11.

⁸⁰ *Ibid.*, p. 14.

⁸¹ *Ibid.*

⁸² *Ibid.*, p. 21.

⁸³ *Ibid.*

torn clothes⁸⁴, with 'barefoot' feet⁸⁵: «...the one in the torn shirt has a yellow shoulder, the other has a belly like a board, that other one there is ready to faint from hunger...»⁸⁶. Meanwhile, the inner world of the characters is loaded with meditations on the difficult economic situation in which they find themselves: the beggar «remembers the time when there was no need to beg. On the contrary. Do you remember how he helped the beggars who came every Saturday at the door of his shop when he was a blacksmith... And today? He is rarely helped by anyone, because there are many beggars»⁸⁷.

The authors of Critical Realism tried to give the social side of the characters, for this reason, they presented the characters in their social activity, in their work, learning process, or during the search for alms. The characters of Critical Realism are not characters who sit at home, at social parties, debating long topics among themselves, they are active characters, at work, in activities and constant movement: the sailor is seen catching fish in the great waves of the sea⁸⁸, the female worker appears as she harvests wheat with difficulty⁸⁹, the beggar appears in his extreme poverty asking for alms⁹⁰. So, this literary period presents the characters in their difficult daily life, in order to give the Albanian life at the height of difficulties.

In the children's literature of this period, there are characters with universal names, such as the old man, the boy, mother, father, but each of them has a special individuality: one is rich⁹¹, the other is poor⁹², one is arrogant⁹³, the other is modest⁹⁴, one is a miser⁹⁵, the other is the one who gives alms⁹⁶, one is useful for society⁹⁷, the other is useless for them⁹⁸.

The characters are universal in their names, but their characteristics and problems are of the Albanian environment. The authors build the characters with Albanian characteristics because through their literature they intended to hit the Albanian environment, to present the concrete defects of Albanian life, and their literature to influence those defects to improve. Therefore, the characters of Critical Realism are characters with Albanian characteristics, with Albanian behavior and morals of the early 20th century. The authors of

⁸⁴ Migjeni, *Prozë [Prose]*, cit., p. 44.

⁸⁵ *Ibid.*, p. 40.

⁸⁶ *Ibid.*, p. 72.

⁸⁷ *Ibid.*, pp. 44-45.

⁸⁸ Mjedja, *Guxo [Dare]*, cit., p. 8.

⁸⁹ *Ibid.*, p. 10.

⁹⁰ Migjeni, *Prozë [Prose]*, cit., p. 44.

⁹¹ Mjedja, *Guxo [Dare]*, cit., p. 13.

⁹² *Ibid.*, p. 14.

⁹³ *Ibid.*, p. 31.

⁹⁴ *Ibid.*, p. 35.

⁹⁵ *Ibid.*, p. 44.

⁹⁶ *Ibid.*, p. 45.

⁹⁷ *Ibid.*, p. 35.

⁹⁸ *Ibid.*

this period did not want to give the weaknesses of man in general, but the weaknesses of the Albanians of their time, so that their texts could influence the Albanian society and state to improve Albanian life at the beginning of the 20th century.

Negative characters in this period have a social character, so children's literature of this period is filled with characters such as misers⁹⁹, cunning¹⁰⁰, boasters¹⁰¹, lazy¹⁰², liars¹⁰³, deceivers¹⁰⁴, conceited¹⁰⁵, characters who appreciate only money¹⁰⁶, who do not help others¹⁰⁷. These characters are portrayed with negative elements, so that they have a negative effect on child readers, so that they distance themselves from negative characters and their behaviors. Thus the children's literature of Critical Realism is the literature of the contrast between positive and negative characters, the contrast between useful and useless characters, the helper and the miser, the poor and the rich, the worker and the unemployed. The contrasts even extend to the characters of the fables of this period, such as between summer and winter, between the wolf and the lamb¹⁰⁸. Negative characters in the literature of Critical Realism are a source of social injustices, social irregularities, social stagnation, abuses, etc.

In the children's literature of Critical Realism, many fables were written which enriched Albanian literature with many other types of animal, bird, and plant characters. The most frequent animal characters in this period are: bird¹⁰⁹, elephant¹¹⁰, cow¹¹¹, dog¹¹², goat¹¹³, wolf¹¹⁴, lion¹¹⁵, ants¹¹⁶, swallow¹¹⁷, pigeon¹¹⁸,

⁹⁹ Migjeni, *Prozë [Prose]*, cit., p. 42.

¹⁰⁰ Mjedja, *Guxo [Dare]*, cit., p. 36.

¹⁰¹ *Ibid.*, p. 35.

¹⁰² *Ibid.*, p. 19.

¹⁰³ *Ibid.*, p. 33.

¹⁰⁴ *Ibid.*, p. 39.

¹⁰⁵ *Ibid.*, p. 44.

¹⁰⁶ *Ibid.*, p. 13.

¹⁰⁷ *Ibid.*, p. 14.

¹⁰⁸ *Ibid.*, p. 31.

¹⁰⁹ *Ibid.*, p. 9.

¹¹⁰ *Ibid.*, p. 13.

¹¹¹ *Ibid.*

¹¹² *Ibid.*

¹¹³ *Ibid.*, p. 31.

¹¹⁴ *Ibid.*

¹¹⁵ *Ibid.*

¹¹⁶ *Ibid.*, p. 23.

¹¹⁷ *Ibid.*

¹¹⁸ *Ibid.*, p. 32.

bee¹¹⁹, ears of corn¹²⁰, wheat¹²¹, weeds¹²², fox¹²³, frog¹²⁴, monkey¹²⁵, sheep¹²⁶. The social character is what distinguishes the animal characters of this literary period from other literary periods: the elephant allegorically shows the power that wealth has in society, so when the elephant is dressed in gold, everyone respects him, when he is dressed simply, no one respects him¹²⁷; the dove saves the bird, showing the need for help that the members of a society have for each other¹²⁸; the bee allegorically shows the positive effect that human work has on society¹²⁹: wheat and weeds allegorically show the useful man (wheat) and the useless man (weeds) in society¹³⁰. Therefore, if in Romanticism the wolf and the lamb were characters that had the character of the conqueror (the wolf) and the conquered (the lamb), in Critical Realism these characters have the social characteristics of the strong man (the wolf) and the weak man (the lamb) in society¹³¹.

The literature of Critical Realism was an engaged literature, a literature with a mission, that by presenting different social strata, characters from those strata, tried to influence the improvement of the Albanian society and state.

5. Characters of children's literature of Symbolism

Children's literature of Symbolism did not deal with social themes, it was not an engaged literature that tries to influence the Albanian society, but it was more universal literature, which dealt with universal themes of man, his inner world, his dilemmas. The main themes of this literature are love¹³², family¹³³, death¹³⁴, lies¹³⁵, stages of human life¹³⁶. For example, the literary unit dealing with the subject of human life stages presents the universal characteristics

¹¹⁹ *Ibid.*, p. 34.

¹²⁰ *Ibid.*

¹²¹ *Ibid.*, p. 35.

¹²² *Ibid.*

¹²³ *Ibid.*, p. 36.

¹²⁴ *Ibid.*

¹²⁵ *Ibid.*

¹²⁶ *Ibid.*, p. 39.

¹²⁷ *Ibid.*, p. 13.

¹²⁸ *Ibid.*, p. 32.

¹²⁹ *Ibid.*, p. 34.

¹³⁰ *Ibid.*, p. 35.

¹³¹ *Ibid.*, p. 31.

¹³² L. Gurakuqi, *Vjersha [poems]*, Bari, Laterza & Polo, 1940, p. 44.

¹³³ *Ibid.*

¹³⁴ *Ibid.*

¹³⁵ *Ibid.*, p. 36.

¹³⁶ *Ibid.*, p. 30.

of man in childhood, man in youth, man in maturity and man in old age¹³⁷, without specifying a particular man, of a certain time or place: it is not specified whether the character who goes through these stages of life is Albanian or from another nation, it is not specified whether he is from the 20th century or another century. The purpose of the author of the Symbolism in this unit is to give the four main stages of human life from birth to old age, so that the changes that a person experiences from birth to old age apply to every person¹³⁸.

Just as the themes of Symbolism literature are universal themes, the characters of this literary period are also universal. The characters do not have characteristics of the Albanian environment, but they have universal characteristics of people of all countries. In this literary period, the character of the young man summarizes the permanent preoccupations of the young man: hope, fantasy, fragility, kindness, agility¹³⁹, then the new character is energetic¹⁴⁰, quite active, warrior in life¹⁴¹, with great willpower¹⁴². On the contrary, the character of the old man in this literature is dominated by the universal characteristics of the old man, such as memories, indolence, fatigue, and passivation¹⁴³, he is more meditative than the young¹⁴⁴, but he is often nervous and without the will to live¹⁴⁵. The man character has universal male characteristics such as strength, toughness, he stands out for working outside the home¹⁴⁶, while the woman has universal female characteristics, such as beauty, motherhood, work inside the home, as well as care for her children¹⁴⁷. The characters of the literary period of Symbolism stand out with universal characteristics which characteristics are found not only in Albanians, but in people of other nationalities.

Symbolic literature often used symbolic signs of time to give character characteristics: the young character is compared to bright signs, so youth is like a light¹⁴⁸, like a ray of the sun¹⁴⁹, like spring¹⁵⁰, while the old character is compared to signs that give life in the west and above, life near death, so old age is like autumn, like late flowers, like autumn nature¹⁵¹. The authors of this

¹³⁷ *Ibid.*

¹³⁸ *Ibid.*

¹³⁹ Asdeni, *Lulëkuqja [Poppy]*, Prishtinë, Rilindja, 1968, p. 13.

¹⁴⁰ *Ibid.*, p. 11.

¹⁴¹ *Ibid.*, p. 24.

¹⁴² *Ibid.*, p. 31.

¹⁴³ *Ibid.*, p. 12.

¹⁴⁴ *Ibid.*, p. 24.

¹⁴⁵ *Ibid.*, p. 29.

¹⁴⁶ *Ibid.*, p. 38.

¹⁴⁷ *Ibid.*

¹⁴⁸ L. Gurakuqi, *Vjersha [poems]*, cit., p. 58.

¹⁴⁹ *Ibid.*

¹⁵⁰ Asdeni, *Lulëkuqja [Poppy]*, cit., p. 12.

¹⁵¹ *Ibid.*

literature frame figures from the seasons and from nature to show man and the changes he undergoes over time. Therefore, nature is extremely present in Symbolism literature, its changes are used to give the changes that a person undergoes during life, also its changes give the differences between people based on characters, ages, and professions.

The human characters of Symbolist literature are generally not named by proper names but by general names. The escape from proper nouns shows the attempt of this literary period to give universal characteristics to the person: one character is called a girl and she summarizes the general characteristics of a girl¹⁵²; the other character is called mother and summarizes the general characteristics of the mother¹⁵³; the character named farmer¹⁵⁴ has universal characteristics of the farmer, so he is a guardian of the field, a great worker, a man of goodwill¹⁵⁵, good health¹⁵⁶, useful for the family and society¹⁵⁷; the shepherd character guards the cattle¹⁵⁸, knows nature well¹⁵⁹, knows different animals, and distinguishes them based on their characteristics¹⁶⁰; the suffering man has such universal characteristics as he is lonely, hard-hearted, introverted¹⁶¹, without showing where the source of his suffering is, which could be the country where he lives, society, nation, economy, education, he is simply presented in the literature of symbolism as suffering, avoiding local and temporal characterizations to summarize the most universal characteristics of this man.

Animal characters are also universal characters in the literature of Symbolism for children. If the animal characters in the literature of Critical Realism had a social character that was related to the Albanian environment at the beginning of the 20th century, the animal characters in the literature of Symbolism have universal human characteristics: the wolf in the literature of Symbolism has universal characteristics of the abuser¹⁶²; the dog summarizes the universal characteristics of the faithful man¹⁶³; the horse has universal characteristics of the human helper¹⁶⁴.

¹⁵² Dh. Pasko, *Pylli i gështenjave* [Chestnut forest], Tiranë, Ndërmarrja shtetërore e botimeve, 1958, p. 30.

¹⁵³ *Ibid.*

¹⁵⁴ Asdeni, *Lulëkuqja* [Poppy], cit., p. 31.

¹⁵⁵ *Ibid.*, p. 62.

¹⁵⁶ *Ibid.*, p. 63.

¹⁵⁷ *Ibid.*

¹⁵⁸ *Ibid.*, p. 31.

¹⁵⁹ *Ibid.*, p. 63.

¹⁶⁰ *Ibid.*

¹⁶¹ *Ibid.*, p. 45.

¹⁶² *Ibid.*, p. 49.

¹⁶³ Dh. Pasko, *Pylli i gështenjave* [Chestnut forest], cit., p. 39.

¹⁶⁴ Asdeni, *Lulëkuqja* [Poppy], cit., p. 16.

6. *Characters of Socialist Realism*

After the end of the Second World War, Albania remained part of the Eastern European states in which the communist ideology spread. At this time, a new literature began in Albania, which was called the Literature of Socialist Realism.

The literature of Socialist Realism was engaged literature that defended the political, economic, and cultural ideas of communist ideology. This literature was a propaganda tool in the hands of the Albanian communist state that glorified communism and criticized, insulted, and mocked everything non-communist, such as Albanian tradition, religion, and other non-communist ideas of the political and cultural plane. Blaming other ideologies and glorifying communism are the basic ideas of Socialist Realism literature.

The literature of Socialist Realism describes a world that is divided into two opposite oppositions: on one side is the good communist world, while on the other side is the bad non-communist world. Since this is how each literary text was constructed in this literary period, this influenced literature in the Socialist Realization to be clichéd in strict, rigid rules, impoverishing the texts in ideas, because in this literature everything was reduced to communism and non-communism, having no other vital nuances, other topics and ideas, worries and concerns with which the individual may be preoccupied. This led to the fact that characters in this literature are built the same: they change in age and gender, profession, in residence, but they do not change in character, since all characters are reduced to positive communist characters and negative non-communist characters. The construction of literature in such a form made literature in this period not present the world of children, their desires, their worries, their play and fantasy, but on the contrary to present the communist ideological dimension which stifled this literature with ideas that can hardly be understood by children. Each segment of the children's lives presented in this literature is explained by communist ideas, by the conflict between communism and other ideologies.

The positive characters in the literature of Socialist Realism are the good part of society, they are diligent children, and volunteers in social activities, while ideologically they represent communism, therefore they are against religion¹⁶⁵, against tradition¹⁶⁶ and against any other ideology. Communism was identified with positive characters, therefore these characters in this literature are hyperbolized to the point of worship. On the opposite side to them are the negative characters who represent other ideas, such as tradi-

¹⁶⁵ B. Dedja, *Kalamajt e pallatit tim [the children of my palace]*, Prishtinë, Rilindja, 1973, p. 42.

¹⁶⁶ S. Spasse, *Të fala nga fshati [Greetings from the village]*, Prishtinë, Rilindja, 1979, p. 25.

tional, religious, and fascist ideas¹⁶⁷. Such characters in this literature are German¹⁶⁸ and Italian fascists¹⁶⁹, other enemies¹⁷⁰, Albanian saboteurs¹⁷¹, traditional leaders of the Albanian country¹⁷², religious clergy¹⁷³. These characters harm the state, kill people, and behave badly in society, in the family, at school, and at work.

Literary works in Socialist Realism always end with a happy ending for the positive characters and with punishment for the negative characters. The punishment of children who have a negative character is symbolic, their behavior grade is broken at school¹⁷⁴, they are forced to do voluntary work¹⁷⁵, they are forced to sleep with donkeys and cows¹⁷⁶, but in all cases, they are punished.

In Socialist Realism, in each literary unit, in addition to a story with children, there is always a story with adults whose representatives are the children's parents, their grandmothers, their teachers, or members of their society. In the story with children, negative child characters are punished¹⁷⁷, in the story with adults, negative adult characters are killed¹⁷⁸. The punishment of negative characters served as a threat to every child reader who, if he is not in line with the communist system, may find the punishment of negative characters. Thus, in the literature of Socialist Realism we do not have a free society, but a society that is strictly controlled by communist ideas: in this literature it does not happen that a non-communist man is valued more than a communist, it does not happen that a criminal is not punished.

Children's literature of Socialist Realism at its epicenter had children's characters dealing with very serious topics. The characters of Socialist Realism are children, but they have ideals as high as adults, they aim to regulate the family, society, the city, make different nations fraternize, to develop the communist organization of the school¹⁷⁹, and spread communism among them youth, as well as identify non-communist traitors and expose them to society¹⁸⁰. Therefore, a miniature communism is found in the lives of the children's characters of Socialist Realism literature, in the activities that they develop in the family,

¹⁶⁷ *Ibid.*, p. 38.

¹⁶⁸ *Ibid.*, p. 40.

¹⁶⁹ *Ibid.*

¹⁷⁰ Dedja, *Kalamajt e pallatit tim [the children of my palace]*, cit., p. 21.

¹⁷¹ *Ibid.*

¹⁷² Spasse, *Të fala nga fshati [Greetings from the village]*, cit., p. 38.

¹⁷³ *Ibid.*, p. 39.

¹⁷⁴ Dedja, *Kalamajt e pallatit tim [the children of my palace]*, cit., p. 76.

¹⁷⁵ *Ibid.*, p. 86.

¹⁷⁶ Spasse, *Të fala nga fshati [Greetings from the village]*, cit., p. 34.

¹⁷⁷ Dedja, *Kalamajt e pallatit tim [the children of my palace]*, cit., p. 86.

¹⁷⁸ Spasse, *Të fala nga fshati [Greetings from the village]*, cit., p. 44.

¹⁷⁹ *Ibid.*, p. 19.

¹⁸⁰ *Ibid.*, pp. 18-19.

at school, and in society. Such stories motivate child readers to socialize, to develop voluntary activities in society, but obviously, these stories also have a negative side because they do not present the lives of children, or their worries, so the child characters in the literature of Socialist Realism are ideologically charged as much as adult literature characters are charged. In this way, the child characters in Socialist Realism carry on their shoulders ideological missions that exceed the competencies of children and their abilities.

Compared to the characters of previous periods who suffer from the conqueror (in Romanticism), or suffer from poverty, unemployment, or poor medicine (in Critical Realism), the characters of Socialist Realism are free, have welfare, have food, have room for recreation, they have books, they have good education, they have good medical service and they have new houses donated by the state¹⁸¹. Simply in this literature, communist characters lead an artificial life with all the good things. The reason for such a life is the communist state in which they live well, where there is no corruption, there is no injustice, no poverty, no economic problems: all conditions of life are regulated by the advent of communism as with the stick magic. The contrast of the characters between the difficult life they had earlier and the good life they had in communism are used by the authors of socialist realism as a contrast to which they propagate the communist relation to other currents: the contrast of bad life previously and life without problems in communism is found in the background in every literary work of the period of socialist realism.

For the first time in the literature of socialist realism, urban characters are encountered, who have a communist reason in the literature of this period: the communist state has collectivized land to children in the villages and gives them dwellings in the city. In addition to urban characters, characters that are first encountered in the literature of socialist realism are the characters of the state administration that are numerous in each literary work. Everywhere in the literature of this period, there is a large pile of characters representing the state, and administration, giving the idea that the Communist state works well and is present everywhere. So, every literary work in socialist realism has characters such as director¹⁸², worker¹⁸³, engineer¹⁸⁴, Commissioner¹⁸⁵, referent¹⁸⁶, Chief¹⁸⁷, Chairman¹⁸⁸. Even a building has its organization which has a bunch of characters that are located in all these positions¹⁸⁹.

¹⁸¹ Dedja, *Kalamajt e pallatit tim [the children of my palace]*, cit., p. 7.

¹⁸² *Ibid.*, p. 52.

¹⁸³ *Ibid.*

¹⁸⁴ *Ibid.*

¹⁸⁵ *Ibid.*

¹⁸⁶ *Ibid.*

¹⁸⁷ *Ibid.*

¹⁸⁸ *Ibid.*

¹⁸⁹ *Ibid.*, p. 50.

Children's characters in socialist realism have a dose of a rebellious child: the family and society in this literature have many disagreements and many objections. Children disagree with parents, with siblings¹⁹⁰, disagree with teachers¹⁹¹. But they come together among themselves to communist ideals, communist organizations, and communist activities where they stand as a single body. Socialist realism strives to separate children from their family and society, this literature strives to educate children that their real family is only the communist system.

7. Characters in contemporary children's literature of Kosovo

It is more difficult to talk about the characters of contemporary Albanian literature for children because this literature is more complex, with many dominant artistic periods. The characters in contemporary literature are characters who generally have symbolic names, which indicates the artistic character of this literature that values art more and appreciates the figure, and ambiguity. In this literary period, the characters are encountered with names such as Bird¹⁹², White Man¹⁹³, Mountain¹⁹⁴, Short Girl¹⁹⁵, Light¹⁹⁶, Apple¹⁹⁷, Hunters¹⁹⁸, Goodsmell¹⁹⁹, Red-tail²⁰⁰, The Goat²⁰¹, Aries²⁰², Red-beak²⁰³, Warrior²⁰⁴, brother²⁰⁵, enemy²⁰⁶, son²⁰⁷, mother²⁰⁸, Child²⁰⁹, Fisherman²¹⁰.

Even in contemporary literature, there are some characters with interna-

¹⁹⁰ *Ibid.*, p. 53.

¹⁹¹ *Ibid.*, p. 72.

¹⁹² R. Hoxha, *Lugjet e verdha* [Yellow spoons], Prishtinë, Rilindja, 1963, p. 5.

¹⁹³ Ivi, p. 6.

¹⁹⁴ *Ibid.*

¹⁹⁵ *Ibid.*

¹⁹⁶ *Ibid.*

¹⁹⁷ *Ibid.*

¹⁹⁸ *Ibid.*, p. 21.

¹⁹⁹ *Ibid.*, p. 24.

²⁰⁰ *Ibid.*, p. 23.

²⁰¹ *Ibid.*, p. 46.

²⁰² *Ibid.*, p. 48.

²⁰³ *Ibid.*, p. 54.

²⁰⁴ V. Kikaj, *Gurrat* [Founts], Prishtinë, Rilindja, 1987, p. 82.

²⁰⁵ *Ibid.*

²⁰⁶ *Ibid.*

²⁰⁷ *Ibid.*

²⁰⁸ *Ibid.*

²⁰⁹ *Ibid.*, p. 89.

²¹⁰ *Ibid.*, p. 95.

tional names, such as Diana²¹¹, Antigona²¹², Mrika²¹³, Pal²¹⁴, Goti²¹⁵, Goneteta²¹⁶, Tony²¹⁷. These are not traditional Albanian names, but these are the names of characters found in different world literature. Each period of Albanian literature has a kind of names that dominate it, while international names of contemporary Albanian literature are the result of the impact of globalization on Albanian literature, the result of the communication of Albanian literature with other people's literature.

The characters of contemporary literature are closer to the lives of children, their desires, closer to their demands, and their mentality. The characters of this literature behave as a child, they are very optimistic about life²¹⁸, give flowers to their teachers²¹⁹, love their mother and father²²⁰, they play with animals²²¹, take care of nature²²², they want to have the sun for themselves²²³, and even the planets behaves like a child: the moon behaves like Silver hair²²⁴. Characters in contemporary literature are not engaged with ideas that are not suitable for children, as happened before with the religious literature of the Middle Ages, with the national literature of Romanticism, or with the communist ideological literature, in which literature exceeded the world of children. The characters of contemporary literature better present the children's world, using play as a form through which children learn better²²⁵, using the characters' adventures in exotic places that attract children's attention more, as well as using children's imaginary communication with the moon, winter, summer²²⁶. Contemporary literature takes advantage of the latest achievements of psychology and sociology about the world of children and uses them in literary stories to give the mentality of children in a more adequate way.

The characters of contemporary literature are curious to know nature, to know people, and animals, to go out into nature, to enter into adventures, to encounter problems, triumphing over them, but often also failing in front of them²²⁷. The characters of contemporary literature lead more human and not

²¹¹ Rr. Dedaj, *Vepra letrare 4 [Literary works 4]*, Prishtinë, Faik Konica, 2008, p. 104.

²¹² *Ibid.*, p. 130.

²¹³ *Ibid.*, p. 94.

²¹⁴ *Ibid.*, p. 103.

²¹⁵ *Ibid.*, p. 80.

²¹⁶ *Ibid.*, p. 81.

²¹⁷ *Ibid.*, p. 51.

²¹⁸ *Ibid.*, p. 36.

²¹⁹ *Ibid.*, p. 58.

²²⁰ *Ibid.*, p. 42.

²²¹ *Ibid.*, p. 29.

²²² *Ibid.*, p. 51.

²²³ *Ibid.*, p. 217.

²²⁴ Kikaj, *Gurrat [Founts]*, cit., pp. 87-88.

²²⁵ Dedaj, *Vepra letrare 4 [Literary works 4]*, cit., p. 104.

²²⁶ *Ibid.*, p. 217.

²²⁷ Hoxha, *Lugjet e verdha [Yellow spoons]*, cit., pp. 7-8.

artificial lives as in previous periods, they are free from religious, national, and communist concepts, therefore they move spontaneously²²⁸ and find themselves in different adventures where they experience different difficulties, challenges, thrills, getting an educational message from each adventure they experience. The characters of contemporary literature do not only have vices as in Critical Realism, just as they do not only have virtues like the communist characters in Socialist Realism: the characters of this period, being more humane, have both vices and virtues, so there are who sometimes are brave²²⁹, sometimes they are cowards²³⁰, sometimes they are loyal characters²³¹, but sometimes they are disloyal²³², characters that sometimes they behave well²³³, but sometimes they behave badly²³⁴.

The characters of contemporary literature have their complex inner world: inside them encounter meditation, dilemmas, and emotions²³⁵. Being such, the characters of this period, even though they may have the same names as the characters of other periods, such as father, mother, grandfather, and grandmother, they differ a lot from them, because of the inner world, which is specific to each one character. Even the inner world of the characters becomes more complex in accordance with the age of the children to whom the literary text is addressed. Authors of contemporary literature distinguish between different ages of children, and literary books addressed to children in the first grade have simple characters, have children who have fun with letters, and play with syllables²³⁶, in addition to literary works that are aimed at older children and have more complex characters who are concerned with the lives of older children. So, from class to class, the characters of contemporary Albanian literature become more complex, gradually informing child readers with topics that are suitable for each age.

Contemporary literature is the literature of authors who are different literary individuals among themselves, who build literary art each in their own way. Each of the contemporary authors builds the characters in a special way, not like the previous authors who built the same religious, national, social, and communist characters: the ideas of the works of this period change from author to author, from work to work and together with them change also the characters and their formation.

²²⁸ *Ibid.*

²²⁹ Kikaj, *Gurrat* [Founts], cit., p. 10.

²³⁰ *Ibid.*, p. 16.

²³¹ *Ibid.*, p. 12.

²³² *Ibid.*, p. 17.

²³³ *Ibid.*, p. 6.

²³⁴ *Ibid.*, p. 31.

²³⁵ Hoxha, *Lugjet e verdha* [Yellow spoons], cit., p. 16.

²³⁶ A. Mamaqi, *Mësoi Adi shkronjën A* [Adi learned the letter A], Tiranë, Naim Frashëri, 1987.

In contemporary literature, there is also the uniqueness of characters in fables. If in other periods in fables, the animal characters talked among themselves, now the conversation is between animals and children, who are interested in the beauty of certain animals, their melodious voice, and their journeys during the wintertime²³⁷. The child's conversation with animals is more adapted to the world of child readers, it is more pleasant for them, more attractive, and arouses children's interest more. Children in fables also talk with plant characters²³⁸. Through talking with children, flora and fauna are offered more to the children's world, and children's care and love for flora and fauna is increased.

Conclusion

Medieval Albanian literature in artistic form recounted biblical and Quranic events. The characters of this literature were religious characters found in the Bible and the Koran which have an educational character for the child readers, showing them the religious behavior they must follow in order to be saved. Each subsequent period of Albanian literature brings new characters, increasing the number of characters and their types in Albanian literature. Thus, the characters of Romantic literature no longer have a religious character, but they have an Albanian national character. The children's literature of this literary period set itself the task of educating Albanian children: the child characters of this literature educate the readers towards good actions, education, professionalization, towards good behavior in the family and society and call for moving away from evil, lies, betrayal, prejudice. Critical Realism introduces a new character who is preoccupied with Albanian social issues. The characters of this literature underline the Albanian defects during communication with different social layers, from the low level of society to the state leaders. The literature of symbolism brought characters with universal characteristics to shift the attention from the Albanian man to the man in general. The characters of this literature summarize the general characteristics of the parent, the hero, and the conqueror. Meanwhile, the literature of Socialist Realism brought for the first time in Albanian literature the communist character hyperbolized to the point of worship. In this literature, communists are confronted with all other characters, dividing the world into positive characters (communists) and negative characters (non-communists). While every previous literary period-built characters in one form, such as religious, national, social, symbolist, and communist characters, this does not happen in contemporary literature,

²³⁷ Kikaj, *Gurrat [Founts]*, cit., p. 96.

²³⁸ *Ibid.*, p. 103.

which has a heterogeneity of authors and characters. This literature presents the world of children, their demands, and desires in a more faithful form.

Albanian children's literature has thus passed through different literary periods, changing both on an ideological and an artistic level. Along with other units, the character of this literature has also changed, which has the characteristics of each period within it. What has characterized the character of Albanian children's literature is the frequent appearance of an ideologically charged character who has tried to influence children, their ideas, their beliefs, and emotions. The reasons for the impact on the child reader have been different and are related either to religion, to the nation, or to communist ideology, but the attempt to influence children has been preserved in a large part of the history of Albanian literature. Literary periods that did not aim to influence child readers have had marginal power in Albanian literature.

Eugenics as an Element of the Worldview and the Basis of Nazi Pedagogy in the Criticism of Polish Humanists

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ABSTRACT: The article is devoted to the presentation of the main points of criticism of Nazism emerging in Germany in the 1930s. This criticism was carried out in Polish scientific literature before September 1, 1939, that is, i.e. before the armed attack of Germany on Poland. Its authors were Polish pedagogues and philosophers. An important thread of the entire Polish trend of Nazism criticism was the disapproval of eugenics. It was understood at that time as an element of the Nazi worldview that the Third Reich implemented in education. The role of eugenics was strengthened by its understanding as a scientific basis of racism. Education equipped with eugenics created a trend of pedagogy known today as Nazi pedagogy. With its participation, the Germans tried to create an ideal German (Nordic) race – a master race.

EET/TEE KEYWORDS: Eugenics; Criticism of racism; Polish criticism of Nazism; Racism as a worldview; Nazi pedagogy; XX Century.

Introduction

The article was created as a result of research into archival historical sources, which are publications created in Poland in the years 1930-1939. As can be seen from the bibliography, the works published at that time were: independent scientific monographs (books), scientific articles (in the area of pedagogy, philosophy of education, philosophy, and even theology), and articles in the press. All of them created the Polish trend of racism criticism, in particular eugenics criticism. They also belong to the broader area of Polish criticism of Nazism, which took place before the outbreak of World War II. There are many written historical sources in Polish scientific literature and journalism

showing the dangers of Nazism emerging in the Third Reich. A modest selection of them was published in the journal «Polska Myśl Pedagogiczna» [«Polish Pedagogical Thought»]¹.

Criticism of German national socialism (Nazism)² is, alongside the unrivaled in the world Polish Sovietology, one of the essential elements of the culture, science, and political life of Poles in the first half of the 20th century.

1. *Eugenics – the inspiration and scientific justification for racism*

When the fashion for eugenics swept the Western world, the majority of the Polish intelligentsia was very cautious. In 1917, in the Kraków newspaper «Przegląd Powszechny», Father Stanisław Podoleński gave a detailed overview of the international development of the eugenics movement, also noting its presence in Poland and attempts on the part of its advocates to influence legislation. In strong words, he wrote about eugenics as a threat to humanity³.

The attitude of Polish conservative-nationalist and Catholic circles towards the activities of eugenicists should be considered on at least two levels. The broader one, which at the same time carries the so-called hard statements, is the level of references to the ideological dimension of eugenics and its presence among political, social and cultural movements in the world. These movements, linked to different types of socialism and the ways in which they were implemented in the 1930s, usually with violence, deception and blood (Spain, the USSR, China, Germany), carried – as an integral part of the new civilisation with the new man – also the question of a ‘better’ race and an improved man, along with the dangerous examples of hard eugenics (e.g., sterilisation) already present in the 1930s.

The eugenics movement, which drew its justifications from socialist and Marxist aspirations, carried with it the marginalisation of the Christian worldview, particularly Catholic morality, and the marginalisation of all religions. On the part of the Christian religions or, more generally, of the Latin civilisation, the limits of the eugenics movement were set where it violated the dignity of the person by introducing instrumental treatment or the elimination of persons with developmental deficits. In the Polish discourse on the demands of eugenics, a discourse rooted in Catholicism, there are no compromising

¹ J. Kostkiewicz, *The Polish Current of Criticism of German National Socialism (Nazism) Before 1939, Bibliography of Sources*, «Polska Myśl Pedagogiczna», vol. 6, 2020, pp. 349-362.

² See J. Kostkiewicz, *Polski nurt krytyki nazizmu przed rokiem 1939: aspekty ideologiczne i pedagogiczne*, Kraków, Arcana, 2020.

³ S. Podoleński, *Eugenika i ruch eugeniczny*, «Przegląd Powszechny», vol. 193, 1932, pp. 319-324.

comments. The hard methods of eugenics, such as isolation to avoid procreation, sterilisation, forced abortions, euthanasia and others are called evil.

The second level of reference to the eugenics movement concerns its soft dimension (practised outside the eugenics movement), such as premarital medical examinations and certificates, mother and childcare, and physical education. Here, the possible ideologization depended on the methods of implementation (for example, excessive competition or sports research led to the objectification of the person and was not advisable). On these issues, there was openness to solutions that promoted health and proper human development, and no criticism of elements that served health education.

1.1. *Reception of the discourse on the development of eugenics in the Western world*

It is evident in the writings forming the broad Polish current of criticism of Nazism that the worldwide eugenics movement was seen in a dual role: as one of the inspirations for racism, and eugenics itself as its 'scientific' justification for it. Consideration of both these roles was combined with reference to the British naturalist and anthropologist Sir Francis Galton (1822-1911), who was considered to be the founder of eugenics, particularly to his work *Hereditary Genius* (London 1869)⁴, and also to the myriad of eugenics societies and their journals. The main critics of eugenics in Poland were Father Franciszek Sawicki (Pelplin), Father Stanisław Podoleński (Kraków), Father Ignacy Świrski (Vilnius) and others. Podoleński linked the name and the beginning of eugenics to Galton's research into heredity in humans and animals and the idea of using it to improve the human race. He called the science that was to deal with the study of the data needed for eugenics (of Greek etymology) meaning «born of a good race», «hereditarily endowed with noble qualities»⁵. Stanisław Podoleński did not overlook the fact that, from Galton's perspective, eugenics was intended to serve the generations to come. He stressed that the laws Galton proposed were based on insufficient empirical material and, in the light of later research, proved to be wrong, but this did not prevent Galton or his followers from spreading the idea itself.

Podoleński and Świrski recalled important moments in the history of the eugenics movement. In 1905, a chair in national eugenics was established at

⁴ In the writings of Polish critics of Nazism, we find the information that, for example, Galton left a huge sum of money to the University of London for the establishment of a chair (laboratory and library) for eugenic research (I. Świrski, *Eugenika a moralność*, «Ateneum Kapłańskie», vol. 32, 1933, pp. 433-434).

⁵ Podoleński, *Eugenika i ruch eugeniczny*, cit., p. 320.

the University of London, followed by Cambridge and several American universities. Świrski established that, with Galton's efforts, the *Sociological Society* was founded in 1903 and *The Eugenics Education Society* in 1908 to popularise the view of the need to elevate and improve the biological dimension of the human race⁶.

In Poland, the Western eugenics movement was judged to be powerful, with particularly good grounds for growth in England and the USA⁷. Those who wrote about it claimed that they had data at their disposal, including the names of the main researchers and organisers of the movement, the titles of the periodicals promoting it, the aims of the movement, the titles of the works and the research results published in them. In the Kraków based «Przegląd Powszechny» Stanisław Podoleński reported that the *Eugenics Education Society*, renamed in 1926 as the *Eugenics Society*, published the journal «Eugenics Review» and was founded in 1908 with the participation of Charles Darwin's sons. Another journal, «American Breeders Association», was the organ of a society founded in 1903 that functioned as *American Genetic Association* since 1914. The monthly «Journal of Heredity», and many other journals published by various eugenics societies, were also mentioned. The activities of the *American Eugenics Society* formed at the second International Eugenics Congress held in New York in 1921 (the first was held in London in 1912) were commented on. Podoleński spoke of the *Eugenics Record Office*, the publisher of «Eugenical News» that practised, in his opinion, the strongest eugenic propaganda⁸.

The observation of the world arena of eugenic movements with a socialist profile brings us to the conclusion that, parallel to the Anglo-American movement, a movement called *Rassenhygiene* (hygiene of race) initiated by W. Schallmayer and A. Ploetz, emerged in Germany. Polish commentators anticipated the dangers to humanity from the development of eugenics and noted that German eugenics moved in a slightly different direction than the British-American. Both Sawicki and Świrski point to a different understanding of the whole question of race hygiene in Germany from Galton's, particularly in the use of a different concept, namely, the hygiene of the races or the hygiene of reproduction and, most importantly, its extension beyond the dimension of the individual. In Germany, the reference to the human race was replaced by a reference to a particular race.

With many typologies of the human races popularised at the time⁹ and

⁶ Świrski, *Eugenika a moralność*, cit., p. 433.

⁷ Podoleński, *Eugenika i ruch eugeniczny*, cit., p. 321.

⁸ Id., *Eugenika i ruch eugeniczny*, cit., pp. 321-322.

⁹ Examples of typologies of human races and various comments on the results of research can be found, among others, in: F. Sawicki, *Nowoczesne teorie rasowe*, «Przegląd Powszechny», vol. 201, 1934, pp. 19-33.

the research into them, this shift was of vital importance. Thus, German eugenics is a totality of measures for the successful development of the Nordic race (and not the human race in general), through which both individuals and collectivities could be subjected to eugenic measures. The understanding of eugenics as racial hygiene, adopted after Ploetz, included sanitary statistics, evolutionary theory regarding selection, protection of maternity, infant care, physical education and other issues¹⁰. Reports that dominated the pages of Polish conservative and Catholic scientific journals focused on what Anglo-Saxon and German eugenics shared with the aspirations of the West, which was their reliance on Darwin's theory. While Galton's starting point was heredity, the Germans (W. Schallmayer and Ploetz and others) were concerned with the elimination of degeneracy in the form of reduced physical and mental development of offspring.

On Ploetz's initiative, the *Gesellschaft für Rassenhygiene* was founded in Berlin in 1905, and was renamed in the following year as *Internationale Gesellschaft für Rassenhygiene*¹¹. The influence of the Society was mainly through the work of Ploetz himself. In 1910, a second major Society was founded under the name *Deutsche Gesellschaft für Rassenhygiene*, with its headquarters in Berlin and branches in other cities. Subsequently, Ploetz founded *Das Archiv für Rassen und Gesellschaftsbiologie*, intending to publish papers on eugenics research. This archive was to become a centre for eugenics, collecting all the available knowledge about the Germanic race. According to the Polish intellectuals Father Podoleński, Father Świrski, Father Sawicki, Father Tochowicz and Father Pastuszka, these centres worked primarily for the promotion of Germans and Germany, which was negative in its expressed attitude towards other races and nations; for this reason, their activities were interpreted as anti-Polish and anti-Slavic.

The Germans labelled themselves as the master race, joined the eugenics movement under the very name, continued to escalate the development of the grand vision of their nation. Father Świrski claimed that the eugenics movement in Germany was awakening independently of Galton's and was supposed to have been inspired by Ploetz's book *Die Tüchtigkeit unserer Rasse und der Schutz der Schwachen*, which was well-known in the scientific circles of the time. Meanwhile, the tone of the Polish discourse on the eugenics movement expressed great disapproval of its presence and activities.

According to its Polish critics, eugenic propaganda across the world was effective not only because of Germany's contribution but mainly in connection with its spread in the Anglo-Saxon countries. And even though the traces or beginnings of eugenics can be found in antiquity, in Plato but also in the practices of Sparta and China, it was only the great industrialisation of the

¹⁰ Świrski, *Eugenika i moralność*, cit., pp. 433-434.

¹¹ Podoleński, *Eugenika i ruch eugeniczny*, cit., pp. 322-323.

19th century, Podoleński claims, that, by throwing millions of lives into the misery of industrial cities, unhealthy conditions, social pathology and social and moral disaster for entire families and communities, ultimately led to visible physical and spiritual degeneration. This fact alone was regarded by the founders of eugenics as legitimising its development, while among its Catholic critics in Poland it was a call for an immediate improvement of the workers' lives.

The knowledge of the eugenic aspirations in the Western world was extensive in Poland and it became an important element of the decisions and choices made at the state level, particularly the refusal to adopt eugenics legislation, while in the West eugenic laws had already been adopted. In Poland, the criticism of eugenics and its applications was fundamentally rooted in the Catholic religion.

The criticism of the eugenics movement raised clear questions about the relationship between it and Catholicism. Polish intellectuals identified with the position taken in the encyclical *Casti connubii* of 31 December 1930 and the Vatican decree *De educatione sexuali et de «eugenica»* of 21 March 1931. In them, eugenics was not condemned as a science, but Pius XI rejected certain views and aspirations of scientific and practical eugenics leading to the biological improvement of the race, listed in detail in the encyclical¹². The instrumental treatment of man was rejected, and it was acknowledged that eugenics could only be applied following natural and divine law, for man must benefit from the achievements of science¹³.

Church documents thus rejected eugenics as insofar as it was against Catholic anthropology and morality. In the interpretation of Polish humanists, however, German National Socialism used eugenics to justify racism, with its intention of practically stopping the process of racial mixing. This, in turn, underpinned the idea of strengthening the Nordic element among the German population, for the defence of racial purity became the most important goal of the German Reich. It was believed that races and individuals were not equal. The value of a race was proposed to be measured by its cultural productivity throughout history, and the value of individuals according to their racial affiliation and the life energy they provided¹⁴.

Most Polish critics of the eugenics movement spoke of the unfortunate success of its propaganda in the world. Polish humanists thought that the Germans might just look silly with the self-imposed label of the master race, had it not been for the widespread approval of the eugenics movement and the significance given to it by the universities' involvement in eugenics research.

¹² See: *Encyklika o małżeństwie chrześcijańskim*, Kraków, Księża Jezuici, 1931, pp. 37-39.

¹³ Podoleński, *Eugenika i ruch eugeniczny*, cit., pp. 329-331.

¹⁴ J. Pastuszka, *Rasizm jako światopogląd*, «Ruch Katolicki», vol. 9, 1939, p. 105.

Catholic conservatives were, of course, very sceptical and mistrustful about its findings¹⁵.

As early as 1917, Father Podoleński noted the presence of the eugenics movement in Polish liberal-left and secular circles and their attempts to influence Polish legislation¹⁶.

In Poland, as it regained its independence in 1918, alongside the substantive and ideological rejection of eugenics there was also a growing awareness that the German eugenics movement, as a justification for German racism, was a threat to neighbouring nations. Strong opposition came to the fore as Hitler's vision of eliminating Jews came into public view. Notably, at this point, the weekly magazine «Myśl Narodowa» reported that the loudest opposition to the National Socialist plans of Hitler's government was raised by Polish nationalists and Jews.

This fact confirmed the position of Polish nationalists towards Jews. While strongly criticising Jewish involvement in politics and the economy, they did not raise racial or religious issues as being subject to negation or rejection, hence it is safe to say that the Polish nationalist movement was critical of Jewish domination, but it was not anti-Semitic in terms of race and religion.

Socialists and liberals on the other hand reacted moderately or approvingly to the demands of eugenics. When the defence of racial purity was proclaimed as the most important goal of the German state, Polish critics of Nazism saw that it was part of a cultural trend present in Europe, which acted as a protective umbrella for German racism. In Poland, the fact that racism adhered to a principle of the inequality of races and individuals was received with disapproval. On the one hand, it was regarded as such an absurdity that it would have no negative impact on Europe. On the other, the self-label of race of masters was seen as a manifestation of German hubris, with which Poles were well familiarized during the years of the partitions. Now, however, with the growing importance of eugenics it was recognized that it had found new arguments in a new space. As a result of their own historical experience, Poles could not accept any tendencies of this kind.

Various minorities enjoyed great political and cultural freedoms in the Poland of the time, and it was from these circles that the project of the Eugenics Act, prepared by the *Polish Eugenics Society* (for its membership see M. Gawin¹⁷), emerged; this did meet with a positive response from Polish society, even though it was broadly criticised or ignored by Catholics. Finally, several

¹⁵ *Ibid.*

¹⁶ Podoleński, *Eugenika i rucheugeniczny*, cit., pp. 323-324.

¹⁷ M. Gawin, *Rasa i nowoczesność. Historia polskiego ruchu eugenicznego (1880-1952)*, Warsaw, Neriton-IH PAN, 2003.

negative reviews of the project were published¹⁸ and eventually, the draft of the Eugenics Act was not approved by the Sejm of the Second Polish Republic.

And so, the attempt of Poland's liberal-left to follow 'progressive' Europe failed even though, according to progressive Europeans, this fact alone should have been a source of shame. But today, Poles can be proud of their rejection of eugenics laws with racist tendencies. The attitudes of Poles towards the eugenics movement clashed with the positions of the countries that adopted eugenics-based legislation. These were mainly countries dominated by Protestantism (except Britain). In the words of one of Polish Catholic philosopher, eugenics may give some guidance to the health policy of the nation, but

An hour of doom would strike for a nation that would regard the inheritance of its blood as evil fate, from which there was no way out to the grand paths of history¹⁹.

Konstanty Michalski made this statement in the context of Polish-German and German-Jewish relations to point to the one-sided and fragmented choice of arguments made by those who succeeded in incorporating eugenic thought into the practice of collective life. As early as 1934, Michalski foresaw the dangers of eugenics through racism, based on his philosophical analyses and knowledge of history. He mentioned many circumstances which may or might not turn out to be tragic in human history but also enumerated the many fatal errors of the promoters of racism. Standing by scientific argumentation and avoiding a politically committed stance, he addressed German scholars with an appeal to stop eugenics, racism and National Socialism because he disapproved of these decisions by people with well-known names²⁰. Michalski, a Jagiellonian University professor at the time, argued that European affairs had certainly taken a wrong turn.

1.2. *Eugenics as an inspiration for and justification of racism*

A critical stance towards the existing eugenic laws in various countries appeared in many Polish periodicals of the time. It was believed that in Poland eugenics was supported mainly by medical circles representing liberal-

¹⁸ S. Podoleński, *Projekt polskiej Ustawy Eugenicznej*, «Przegląd Powszechny», vol. 204, 1934, pp. 387-393.

¹⁹ K. Michalski, *Tomizm wobec współczesnej filozofii dziejów*, Księga pamiątkowa Kongresu Filozofii Tomistycznej, Poznań, 1934, p. 10.

²⁰ In footnote 11 of his work *Tomizm wobec (ibid.)* Michalski regrets that that Prof. E. Fischer, Head of the Berlin Institute for Anthropological Research, has begun to lean towards the idea of racism. He spoke about it in his 1933 Rector's Lecture on *Der völkische Staat biologisch betrachtet (ibid.)*.

left views, which Father Podoleński discussed in his writings more than once, and which has been confirmed since²¹. Given this, conservative-Catholic and national-Catholic circles were forced to express their critical position, not only concerning eugenic propaganda abroad but also at home. This included the hard eugenic issues, which were unquestionably rejected, but also the soft approach, such as the debatable matter of pre-nuptial medical advice and certificates. According to Podoleński, this was a topic that was broadly discussed in international scientific literature and therefore required a position being taken on it²².

To assess the significance of the debate undertaken by Podoleński, it is worth looking first into the progress in eugenics-based legislation, which is where he began. In his view, the devastation of the population in the First World War became one of the reasons for the immediate concern about the development of the population (increase in numbers and condition of the health of the population). Hence the legislation on compulsory pre-nuptial examinations was beginning to appear, varying in form in different countries.

The earliest appeared in the United States, in Connecticut as early as 1895, followed by other states. Podoleński mentions the appearance of laws and regulations concerning prenuptial medical examinations in the following countries: Norway (1919), Denmark (1922), Sweden (1915), Turkey (1925); Czechoslovakia (draft in 1928) and Germany (1934); in France various drafts were under discussion²³. In Poland, at the time of publication of the text quoted here (in 1934), the matter was still open²⁴.

²¹ This is confirmed by the work of: Gawin, *Rasa...*, cit. p. 90 and p. 281.

²² S. Podoleński, *Problem lekarskich porad i świadectw przedślubnych*, «Przegląd Powszechny», vol. 204, 1934, pp. 45-63.

²³ *Ibid.*, pp. 45-63.

²⁴ *Ibid.* (see also: *Projekt polskiej Ustawy Eugenicznej*, «Przegląd Powszechny» 1934, vol. 204, pp. 387-393. In the matter of premarital medical examinations Podoleński speaks of three possibilities: the first leaves everything to the will of the parties involved and excludes any intervention from state authorities. The parties involved can communicate the result of the examination to each other or not (the majority of the supporters of this form believe that the fiancées should present each other with a medical certificate). The second and third forms no longer allow for discretion. The second has various modifications of its own, asserting ultimately not only that the test be carried out and its fact (though not the result) communicated to the authorities, but also that those concerned exchange their results. The third and most severe form would oblige the submission of the test result to the authorities, with a negative result meaning the postponement (prohibition) of the union until the completion of the required treatment, or its abandonment. Podolenski stresses that the last formula takes away the right of decision from those concerned and puts it in the hands of the state. He is astonished by the legitimacy of this kind of thinking in the world, which also permeates Poland. Podoleński identifies with the preferences of Catholic circles on this issue, and they are as follows: in order to guarantee the freedom of those wishing to marry, it is best to adopt the first form as free from the interference of the state and leaving the handling of the whole matter to the interested parties and their families. Ideally, it should become a universally applicable custom, protecting all involved from unpleasant surprises and having an educative effect on society. In doing so, Podoleński discusses

In 1934, Podoleński wrote a whole article on the draft eugenics law prepared by the Polish Eugenics Society, which he severely criticised and considered unworthy for approval. It is worth quoting Podoleński on the definition and function of the new science formulated by him at that time:

Eugenics, as the science deliberating the conditions for raising the physical and spiritual virility of the race (biologically considered), is a way of appropriately influencing reproduction and offspring²⁵.

Podoleński did not entirely disapprove of the sense and desirability of physical and spiritual improvement; these in themselves he considered good and worthy of realisation, but he proposed other, less controversial methods, such as raising the standard of hygiene of, economic regeneration, elevating the moral condition of the family and society and medical care. However, in the project he completely rejected negative eugenics, as an extreme denial of love for one's neighbour, as well as the confinement in institutions of people among whom reproduction was considered undesirable (sterilisation), forced abortions, which he called a bloody massacre, and propaganda for the prevention of pregnancy. Particularly that all this was supposed to happen, Podoleński says, with the poverty of so-called positive eugenics, deficiencies in hygiene and in legal regulations for working mothers and others. He finds the project unacceptable for Catholics²⁶. Eventually the Sejm of the Second Republic never adopted eugenics laws.

In 1934, in connection with the eugenics law passed in Germany, Father Dr Władysław Wicher undertook a critique of it against the background of a negative assessment of German National Socialism. He emphasised the restriction of family rights contained therein and the excessive rights of eugenics activists. He mentions the nine eugenic indications for sterilization listed in the German National Socialist law of 1934, including congenital mental illness, schizophrenia, persecution mania, epilepsy, Sydenham's chorea, hereditary blindness, hereditary deafness, severe alcoholism and physical underdevelopment. As is apparent, not only eugenic but also economic considerations come into play here. Wicher balks at the total state control over parental rights introduced in Germany²⁷, reminding his readers that the encyclical of Pius XI

many issues that are medical, social, and ethical (he points out the risk of corrupt behaviour in obtaining certificates). He demonstrates his knowledge of the positions of many authorities in the medical field and their highly sceptical attitude to the issue of statutory medical pre-nuptial certificates. He cites the positions of prominent European moralists and jurists, both in line with and opposed to his views. He refers to Pius XI's encyclical *Casti connubii*, in view of which the third formula, placing the decision on the possibility or impossibility of marriage in the hands of the state, should be rejected (Podoleński, *Problem lekarskich badań i świadczeń*, cit., pp. 51-60).

²⁵ Podoleński, *Projekt polskiej Ustawy eugenicznej*, cit., p. 387.

²⁶ *Ibid.*, p. 393.

²⁷ W. Wicher, *Świadome macierzyństwo*, «Ateneum Kapłańskie», vol. 34, 1934, p. 483.

places important limitations on this issue. Sterilisation may not be carried out either by the state or by an individual; it is allowed only if it would serve to save the health or life of the sterilised person. Wicher is also critical of what is called positive eugenics' defence of motherhood outside marriage, which was promoted in Germany by Alfred Rosenberg (in *Der Mythos des 20 Jahrhunderts*, München 1933, p. 582)²⁸, seeing it as an instrumentalization of women. In his criticism, Wicher draws on various grotesque ideas from German writers, mentioning the peak of absurdity he found in the ideas for the effective and rapid improvement of the German race through special experiments. He cited Willibald Hentschel's project, which proposed «to lock in 1000 racially healthy German girls with 100 racially healthy young men, the result will be 1000 racially pure German children»²⁹. He also adds Staemmler's statement that «the right to the struggle for existence, fertility, selection, inheritance and others..., are the most sacred rights, more sacred than religion, than the rights of peoples»³⁰. Wicher sensed an air of horror in these ideas; saying that among many areas of life and their laws – laws of science, technology, economics – human rights are not mentioned in German writing. He criticises Zimmermann for his views expressed in *Deutsche Geschichte als Rassenschicksal* (Leipzig 1933), for denying the family its natural rights concerning procreation, for placing the rights of the state over the child above those of the parents. As a Catholic priest criticising and judging eugenics from a religious perspective, Wicher says:

- Caring for the body is a good, but it is subordinate to the soul.
- Eugenics understood naturalistically and biologically puts the rights of the totalitarian state before the rights of human beings, which is unacceptable.
- The state does not have a right to the citizen's body and therefore has no moral right to sterilise.
- Race in itself is good, but it cannot be placed before spiritual goods and the divine, and it can only be ennobled by equitable means.
- The Church does not accuse of grave sin those who, when entering into a family, may presume that their offspring will not be entirely healthy. It therefore considers pre-nuptial medical examinations helpful but not decisive for a person.
- Favouring the exemption of the mother from non-family tasks is understandable, however – following Pius XI's encyclical *Quadragesimo Anno* – no injunction or prohibition can be applied³¹.

²⁸ *Ibid.*

²⁹ *Ibid.*, p. 484.

³⁰ M. Staemmler, *Rassenpflege im völkischen Staat*, München, 1933, p. 7; after: Wicher, *Świadome macierzyństwo*, cit., p. 484.

³¹ *Ibid.*, pp. 488-489.

A similar state of awareness of and attitude towards the eugenics movement and German racism can be found in the work of the Polish pedagogue Franciszek Śniehota, author of the reports from the journal «Zeitschrift für pädagogische Psychologie und Jugendkunde», published in the pages of «Kwartalnik Pedagogiczny». In one of the issues of the journal from the second half of 1933, Śniehota writes about an article whose author takes a middle position between the extreme supporters of heredity theory and the fashionable promotion of eugenics. One can read between the lines a certain submissiveness of the Polish author towards the eugenics movement in Germany. Śniehota seems to fully understand the ideological direction in which German pedagogy was heading. As he reports, Professor A. Busemann openly proclaims in the pages of a peer-reviewed journal the need for the selection of gifted individuals³², concluding that «at present in Germany it is a matter of selecting the most valuable individuals for the uplifting of the Germanic race». Śniehota also discusses the deep fusion of pedagogy and psychology that was emerging in Germany at the time concerning questions of race: pedagogical psychology is today, in terms of theory and practice, the central field of all pedagogy. It is, as it were, the «pedagogical organology»³³, also adding that teacher training takes on the profile of service to the racial-eugenic ideas of National Socialism.

In conclusion, it should be emphasised that in interwar Europe, eugenic postulates were an expression of modernity and were mostly advocated by the left and liberals. Such an interpretation of the European and German reality of the 1930s was conveyed by Polish academics and Catholic clergy³⁴. In Poland, strong criticism of the eugenics movement was shared by the Catholic intelligentsia with a national orientation³⁵, which confirms the thesis about the geographical and historical background for nationalism (Polish nationalism cannot be compared to German nationalism). This conclusion stems from the texts from the 1930s mentioned above³⁶. Polish criticism of eugenics did not concern the promotion of life hygiene, economic regeneration, moral uplift,

³² F. Śniehota, *Zeitschrift für pädagogische Psychologie und Jugendkunde*, Leipzig, 34. Jahrg., 1933, n. 7-12, «Kwartalnik Pedagogiczny», vol. 2, 1934, p. 192.

³³ *Ibid.*, p. 194.

³⁴ Podolenski, *Projekt polskiej...*, cit.; W. Wicher, *Świadome macierzyństwo*, cit., and others.

³⁵ M. Gawin writes: «Polish nationalists rejected eugenics because of the position of the Catholic Church and the anti-Polish aspect of racial hygiene in Germany». This is a true but highly simplistic claim, disregarding Polish national traditions and the resulting attitude to the question of race. If corrected it would read as follows: «Polish nationalists rejected eugenics and racism because their slogans were foreign to the traditions of Polish national culture, including the Catholic faith». Gawin discusses the highly critical stance of the Catholic Church in Poland towards eugenics in the chapter *Kościół katolicki w Polsce wobec eugeniki i kontroli urodzin* (Gawin, *Rasa...*, cit., pp. 240-244).

³⁶ S. Podoleński, *Eugenika dzisiejsza, jej drogi i bezdroża*, «Przegląd Powszechny», vol. 194, 1932, pp. 166-186.

medical care or the rights of working mothers, which all found full support among the Polish Catholic intelligentsia.

2. Racism – the leading idea of German national socialism

Before 1939, the rejection and stigmatisation of racism due to its association with Nazism were commonplace in conservative-nationalist Catholic circles in Poland. Many examples can be quoted, including the last pre-war issue of the journal «Ateneum Kapłańskie» of July 1939. The volume, published in the face of the approaching war, which was being discussed while the armed forces were mobilised, opens with two timely and tragically accurate articles: Father Dr Jan Czuj's³⁷ *St Augustine and racism*, and Adolf Kliszewicz's *Totalizm współczesny*³⁸, referring to the ideologies of Germany and Russia.

Criticism of racism in Poland began only with the impending German aggression. It took place despite the low priority of racial issues in Poland and the modest volume of research conducted therein compared to Europe at the time³⁹. Even before Hitler's rise to power and the racist excesses in Germany against the Jews, the idea of racism was criticised by Karol Stojanowski in the radical Polish weekly «Myśl Narodowa»⁴⁰. Conducting research of a *strictly* eugenic nature, Stojanowski took an unequivocally critical position towards racism, especially racism in its German version. He stressed that racial thought in its very nature always serves political ends, just as eugenics does. Also, by its very nature, racial thinking is positive when it blurs racial differences, but negative when it exposes them. Either way, it is exploited politically in every instance. Stojanowski's personal motivation for undertaking racial research is not so much a fascination with the issue as an attempt to shield and valorise the Slavic races from the escalating valorisation of the Nordic race in Europe.

In publications critical of Nazism, defensive racism is discussed in Poland

³⁷ Father Dr. Jan Czuj (1886-1957) – from 1938 headed the Department of Patrology with Homiletics at the Faculty of Catholic Theology, University of Warsaw; first Rector of the Academy of Catholic Theology in Warsaw.

³⁸ J. Czuj, *Św. Augustyn a rasizm*, «Ateneum Kapłańskie», vol. 44, 1939, pp. 1-12; A. Kliszewicz, *Totalizm współczesny*, «Ateneum Kapłańskie», vol. 44, 1939, pp. 13-30.

³⁹ Eugenic and racial issues were taken up in Poland by: K. Stojanowski: *Eugenika*, «Wychowanie Fizyczne» 1927; L. Jaxa-Bykowski, *Jeszcze o «pacyfizmie» w szkolnictwie niemieckim*, «Myśl Narodowa», vol. 2, n. 32, 1930, pp. 496-498; c.d. vol. 2, n. 33, pp. 518-519. K. Stojanowski's critique of the development of racial studies in Germany and the world and his criticism of German racism was undertaken in his works: K. Stojanowski, *Rasizm przeciw Słowiańszczyźnie*, «Głos», 1934.

⁴⁰ K. Stojanowski, *Myśl rasowa w Szwecji*, «Myśl Narodowa», vol. 20, 1932, pp. 274-275; also K. Stojanowski, *Prężność nordyzmu*, «Myśl Narodowa», n. 32, 1931, pp. 11-12.

(e.g., as in the USA, where racial thought came to the fore most extensively) and offensive racism, of which German racism is a leading example. American racism (the inverted commas are used speaking of American as opposed to German racism), in Stojanowski's opinion, despite its defensiveness, caused political problems such as immigration legislation or the activities of the Ku-Klux-Klan, and could not therefore be something desirable.

Offensive racism, Stojanowski believed, had taken strong hold in Denmark and Norway, but was already difficult to incorporate in Sweden. Despite German efforts, similarly to Poland there was no demand for racism in Sweden. In making a critique of the «demand» for racism before Hitler came to power, Stojanowski asked if it were a coincidence that Swedes, a great nation with a greater cultural tradition than the Danes and Norwegians, had not become aware that Nordic ideology, applied consistently, threatened to annihilate the neighbouring nations that were weaker than Germany⁴¹. Similar opinions and evidence in the narrative of Polish 'nationalists' could be found not only in the weekly «Myśl Narodowa» (the adjectives «national» or «nationalist» will be used in inverted commas in relation to this newspaper to distinguish them from their German meanings), but also in other periodicals.

In 1931, Stojanowski reported in a tone of warning that the Nordic movement, as a serious German force, was expanding into Scandinavian countries, including Norway⁴². He warned that German racists were active through the German-Norwegian Society, founded in 1927. The «Baltic Year 1931» project planned 200 propaganda events in Denmark, Sweden, Finland, Estonia, Latvia and Lithuania. The Universities of Königsberg, Griffja, Lübeck and Riga were involved in promoting the idea. Even educators were involved in spreading racism; Peter Petersen gave a lecture in Cologne as early as 1929, as part of the «Nordic-German Week of Science and Arts», entitled *Deutsche rund nordisch Geist, ihre Wechsel – wirkungen in Verlauf ihrer Geschichte*, which later opened a book written in the aftermath of the *week*, edited by Ferdinand Hirt, *Deutschland und der Norden*, published in Breslau in 1931⁴³. Significantly, «Myśl Narodowa» mentions Rosenberg's book *Der Mythos des 20 Jahrhunderts* as a manifestation of German racism that was dangerous to the world⁴⁴.

Polish critics' stance against racism not only provided a thorough appraisal of it, but even more accurately – as only World War II would show – was a prediction of its consequences⁴⁵.

⁴¹ *Ibid.*, p. 275; see also K.S. Frycz, *Złe źródła faszyzmu i hitleryzmu*, «Myśl Narodowa», vol. 18, 1939, pp. 265-266.

⁴² Stojanowski, *Prężność nordyzmu*, cit., p. 12.

⁴³ *Ibid.*, p. 12.

⁴⁴ S. Kozicki, *Nacjonalizm niemiecki. Z powodu książki Alfreda Rosenberga Der Mythos des 20 Jahrhunderts*, «Myśl Narodowa», vol. 33, 1932, pp. 24-25.

⁴⁵ See: Z. Mysłakowski, *Totalizm czy kultura*, Kraków, Czytelnik, 1938; J. Pastuszka, *Filo-*

2.1. *Philosophical foundations of racism as interpreted by Polish philosophers*

All theories gain higher scientific status and have a greater degree of influence when rested on philosophical foundations. Empirical concepts then lose their adventitiousness, acquire the character of necessity and become postulates for real life. This also applies to racism. If racism were based only on the biological theory of inheritance, its impact would be limited to experts in their particular field.

In Poland, it is noted with disapproval that Western philosophy has given racism a helping hand. New philosophical trends hardly happen by chance; their development requires a favourable intellectual atmosphere, Pastuszka writes. They emerge from the intellectual currents promoted at a given time, also referring to the achievements of science. The philosophical trail of the promotion of 1930s racism is particularly discussed by philosophers from Catholic circles. They begin by pointing out that materialism was the direction that dominated philosophy at the end of the 19th century. When it emerged from the natural sciences that life could not be reduced to a physical-chemical process, that it exists as a fundamentally different reality from material phenomena, a direction emerged claiming that life was eternal, universal, and so-called philosophical biologism was criticised. On its basis, life was understood as a creative energy, indestructible and universal, possessing a mysterious dynamic. Governed by its own laws, it brings forth ever-newer forms with the ability to differentiate and take ontically distinct parts⁴⁶. Racism referred to the idea of philosophical biologism when:

it considered not the individual but the race as an autonomous, distinguished vital totality concerning man. A race, therefore, is not only an ensemble of people who possess similar physical and psychological characteristics acquired through heredity, but it is a closed circle of specific life energy, a definite, complete expression of the manifestation of all-life. Race rises to the level of the highest value, to an independent field of reality⁴⁷.

The term «philosophical interpretation of the reality defined as race» formulated in the Polish critique of racism appeared at the time, as if interchangeable with the philosophical foundations of racism. This seems a strange procedure; could it be that it was awkward for philosophers to philosophically justify an idea so low? The term «reality defined as race» is found in the definition quoted.

The idea of all-life was reinforced by the ideas of force and struggle. The

zoficzne i społeczne idee A. Hitlera, «Ateneum Kapłańskie», vol. 40, pp. 329-340, 1937; vol. 41, pp. 23-37, 1938.

⁴⁶ J. Pastuszka, *Filozoficzne podstawy rasizmu*, «Ruch Katolicki», vol. 9, 1939, pp. 156-157.

⁴⁷ *Ibid.*, pp. 157-158.

idea of force, taken from the philosophy of Nietzsche, who is known as the father of National Socialism, states that the goal of every living creature is to amplify its strength. Man also does not desire truth, happiness, material or spiritual goods but the enrichment of life. In this way, man moves towards superhumanity. Starting from these premises, German racism places the development of physical strength through sports education at the forefront, promoting classes in fencing, boxing and other martial arts and physical fitness. Physical strength is to become the basis of willpower; it is also regarded as a prerequisite for the life of ideas, and it reaches its greatest tension in combat. It is not only the opposing forces of nature that fight but also individuals and nations. Pastuszka, in reconstructing this line of the origins of racism, reached back to E. Kriek's *Völkisch-politische Antropologie* (Leipzig 1938), K. Breiner's *Die Welt im Spiegel der Rassenseele* (Breslau 1938), A. Hitler's *Mein Kampf* (München 1934) and others.

Moreover, racism, like Darwinism or Marxism, saw the idea of the struggle for existence as the most important factor in evolution and development, extending it to all areas of life. Pastuszka quotes a maxim from Hitler's *Mein Kampf*: «Whoever wants to live must fight, and whoever does not want to fight an eternal battle in the world does not deserve to live» (1934, p. 317). Racism, by considering life as the primordial element of reality and man as its manifestation, consequently referred to man's cognitive talents. It did not take long to conclude definitively that it is not reason, but instinct, intuition, and the heart that are the proper cognitive organs. Pastuszka finds the sources of these views in H. Bergson, Lessing, Ed. Le Roy, L. Klages and others⁴⁸.

As a result, «racism does not want to develop human intelligence, it distrusts reason and emphasises the role of emotion» Pastuszka writes. It wants to develop a strong will, the joy of action, a sense of responsibility. The development of the intellect should come second, while the first place should be given to the development of the energy, willpower and feelings of the individual, especially the social ones, in connection with the instincts of the nation and the race. The soul of the race is expressed through irrational elements, and it is Pastuszka's open intention to expose this tendency. In his intellectual and Catholic home at the University of Lublin, such a position is unacceptable. Within the framework of racism, education is given new priorities that are only apparently good, while this position is alien to the Christian foundations of education. For it contradicts its main philosophical currents – neo-Thomism and personalism – which were dominant in Polish Catholic culture at the time. This kind of unmasking of racism is important for Pastuszka because it contradicts the philosophy of theistic realism (neo-Thomism) which he repre-

⁴⁸ Pastuszka, *Filozoficzne podstawy rasizmu*, cit., pp. 159-160.

sented and the university milieu which, while giving reason the leading role in cognition, rejected such tendencies.

Pastuszka wrote about the role of the «racial soul» as a source of Nazism. It is worth recalling, that the Germanic soul does not flee from the world (as in the East) but strives for new works and new values. The active attitude of the Germanic race is sought in the geobiological conditions of its formation. Pastuszka calls this psychological-biological determinism and points to it as a characteristic of racism and, at the same time, of the materialism of the 19th century⁴⁹.

Philosophical subjectivism and exaggerated historicism provide further support for racism. From Michalski's writings, the reader of the «Przegląd Powszechny» could learn that the so-called decaying currents in German Protestantism came from two sides: a) philosophical subjectivism, which in the field of religion turned into extreme anthropocentrism, in which man became the *raison d'être* of God and religious life a component of culture; and b) the second decaying current came from exaggerated historicism, which had the effect of denying Christianity its immutable value.

Michalski poses the question: «Did the racial movement, embedded in the National Socialist myth, have a transformative effect on German thinking in the field of religion?». The answer is in the affirmative – it influenced and alluded to the two decaying currents mentioned above. The first makes religion appear not so much as a manifestation of personal consciousness, but as a product of collective life with the symbols of race and blood present in it. With regard to the second current, Michalski claimed that the place of historicism had begun to be taken by the philosophy of history⁵⁰. In the context of his thinking, it is clear that the philosophy of history is more pragmatic than historicism, because it draws on the past and looks to the future, where dreams are located, including those for other nations, which are dangerous and absurd. Michalski does not underestimate Rosenberg's constant reference to dreams, for he calls a dream a thought that arouses human feelings to such an extent that it becomes the driving force behind all longings, desires and actions. These must be present in school education – «instilling dreams (!) in young people is like infecting them with an indelible virus», Michalski wrote.

According to racism, the nation is the organism that gives rise to the spiritual culture of the individual. The idea of the organism, present in the philosophy and sociology of the state in the 19th century, is also applicable here, with the difference that the race has taken on the role of the organism. Individuals – as parts of the organism – are to be subordinated to the whole and draw their biological energies from it. The individual, as part of the vital energy of the organism, has no powers of its own; the organism as a whole, i.e. the race, has

⁴⁹ *Ibid.*

⁵⁰ Michalski, *Fermenty religijne w Trzeciej Rzeszy*, cit., pp. 349-350.

them. German National Socialism, with its totalitarian front, was founded on such a conception of the organism and the rank given to the race⁵¹.

Father Józef Pastuszka's search for the philosophical origins of racism and his critical interpretation of them found a new exponent in Father Franciszek Sawicki, a philosopher with ties to German culture who published extensively in German. In 1934 he wrote that racism was flourishing in a new philosophical direction – the philosophy of life⁵². As a co-founder of this movement, he complained that it had been overrun by racial issues. As a result, Christian philosophy had to deal with them more than it wanted to. In fact, in the articles that came out of this milieu, no texts promoted the idea of racism; on the whole, they were either critical or informative. The development of new trends and ideologies in the pages of Catholic, conservative and conservative-nationalist journals was a constant line of discourse with reality. The founders of racial theories and their concepts were presented (including the French pioneer Arthur de Gobineau and others), and their works were quoted⁵³. It is worth presenting them today in order to show how Catholic circles in Poland critically followed the development of racism. Apart from Sawicki and Pastuszka⁵⁴, Stanisław Podoleński⁵⁵, Koniński and Karol Stojanowski⁵⁶ also identified Count de Gobineau as the father of racism.

These Polish authors stress that in the pre-Hitler phase of development, racism was not specific to Germany. In France, according to Pastuszka, there was a widespread belief that the rulers of Gallia and later of France were a race of long-headed blondes; that racism emerged noticeably with the fall of France, when in the 18th century there was an exodus of thousands of Protestant masses of Nordic origin to Prussia, which took place after the Edict of Nantes⁵⁷. The next stage in the incredible spread of racism came after the First World War. It then became

the political and social programme of German National Socialism, a programme in the service of which science, legislation and the efficient apparatus of the great State stood.

⁵¹ Pastuszka, *Filozoficzne podstawy rasizmu*, cit., pp. 161-162.

⁵² Sawicki, *Nowoczesne teorie rasowe*, cit., p. 19.

⁵³ In France: J.A. Gobineau, *Essai sur l'inégalité des races humaines* (1855); G.V. de Lapouge, *Les Sélections sociales* (1896); Id., *L'Aryen son rôle social* (1899); In North America: M. Grant, *The Passing of the Great Race: Or the Racial Basis of European History* (1923); L. Stoddard, *The Revolt against Civilization. The Menace of the Underman* (1924). These positions are quoted by F. Sawicki (Sawicki, *Nowoczesne teorie rasowe*, cit., pp. 19-33).

⁵⁴ Pastuszka, *Rasizm jako światopogląd*, cit., pp. 101-116.

⁵⁵ S. Podoleński, *Ustawa sterylizacyjna w Niemczech*, «Przegląd Powszechny», vol. 201, 1934, pp. 46-67; Also Id., *Eugenika i ruch eugeniczny*, «Przegląd Powszechny», vol. 193, 1932, pp. 319-331; Id., *Etyka katolicka i eugenika i medycyna*, «Przegląd Powszechny», vol. 214, 1937, pp. 195-208; Id., *Antyreligijny front socjalnej demokracji w Austrii*, «Przegląd Powszechny», vol. 186, 1930, pp. 374-379.

⁵⁶ K. Stojanowski, *Rasizm przeciw Słowiańszczyźnie*, Poznań, Biblioteka «Głosu», 1934.

⁵⁷ Pastuszka, *Rasizm jako światopogląd*, cit., pp. 101-116.

Racism today has many theorists and their work is directed towards stopping the process of racial mixing, strengthening the Nordic element in the German population and defending racial purity⁵⁸.

Pastuszka and Sawicki saw this as the main and most negative goal of the German state. Racism is based on the principle that races and individuals are not equal, and that the value of a race among its members is measured by its cultural productivity. The value of the individual, on the other hand, is measured by his or her racial affiliation and the life energy that is supposed to emanate from it. Pastuszka's account of his studies on the development of racism in Western writing, the treatment of individual life according to the norms dictated by race, and the life of the nation determined by the law of blood⁵⁹, sounds absurd and alien both against the background of Polish cultural traditions and from the perspective of the Catholic religion. In the Polish critique of racism, Niesiołowski's position is remarkable; in his worldview, the issue of race was of little importance, and he would probably never have considered it had it not been for the wave of voices raised on this issue in research and publications in Western academic circles. With reference to this, Niesiołowski suggested that one could speak of «the common characteristics of a nation only in so far as they are historically produced by common development, because, due to such a common mixture of types, the features associated with racial characteristics can prevail at most in this or that part of the nation»⁶⁰. Niesiołowski focused on ways to expose, but also to strengthen, the behaviour of national elites that he considered too weak or absent. He never referred to race in this context, but to the historical legacy, the destiny of the nation, which consolidates some of its characteristics, although, as he said, these could always go in different directions.

Pastuszka, on the other hand, argued with concern that historiosophical racism was popularised in parallel with biological racism by, among others, the Gobineau-Vereinigung, an association of the German intellectual elite that had existed in Germany since 1894. He considered L. Woltmann, L. Schemann and C. Bornhak to be the leading theorists of historical racism on the threshold of the 20th century. He explicitly argued that racism, when it became the political and social programme of German National Socialism, made use of science, legislation and the functioning state apparatus⁶¹. He also wrote about the second wave of racist literature (the first wave had already appeared before the First World War in Germany, France and the United States), the

⁵⁸ *Ibid.*, p. 105.

⁵⁹ *Ibid.*, p. 109.

⁶⁰ A. Niesiołowski, *Formy i metody pracy oświatowej*, Warsaw, Polska Macierz Szkolna, 1932, p. 2.

⁶¹ Pastuszka, *Rasizm jako światopogląd*, cit., p. 104.

existence of which was also emphasised by Sawicki, who spoke of its extent in the 1920s.

In the above interpretations of racism, their authors, especially Sawicki, found the concepts of race and nation problematic for science. They noted that appropriate rearrangements had been made, allowing science to distinguish more clearly between these concepts. As a result, the study of the cultural life of nations was recognised by science as the subject of ethnology, and the study of their physical organisation as the subject of anthropology. This was of little help, however, because under the influence of racial theories and the proclamation of the great importance of race for nationhood, science – especially in its popular form – helped to confuse the concepts of race and nation. In view of this conceptual confusion, Feliks Koneczny defined the concept of race as follows: «It is a variety of zoological species; there are races of animals and there are races of human beings. New and different characteristics often appear, but they rarely become fixed; when they become fixed, one can speak of a race»⁶². Koneczny, however, did not consider the category of race to be relevant. In the accepted juxtaposition of the two categories of race and civilisation, he said that there was no such thing as a pure race and that the alleged struggle between the races was an illusion. Moreover, as human history shows, race need not be pure, but civilisation must be pure, for history is made up of competing civilisations⁶³.

The issue of racism was not a priority for Polish philosophers, especially those of a national-conservative and Catholic orientation. Koneczny was also reluctant to write about this «Western fashion». In terms of research, he considered the subject highly questionable, claiming that the difficulties of anthropology lay in the incompleteness of the material. «There are no studies of the peoples of Asia, so it is impossible to determine which races were original and which came later », he wrote. Koneczny considered skin colour to be an outdated and secondary criterion in anthropology. Attempting to address the widely discussed question of the characteristics of the Nordic race, he wrote: «All the first Slavs were fair-haired, their expansion was of the Nordic type (northward), Slavs of Slavic blood can be found only north of the Carpathians»⁶⁴. Considering the qualities of the mind to be more important than those of biology, Koneczny argues that by bringing together psychological, sociological and historical traits, we obtain what is called civilisation, which is immeasurably more important than race.

⁶² F. Koneczny, *Rasa a cywilizacja*, «Tęcza», vol. 32, 1929, p. 1.

⁶³ *Ibid.*

⁶⁴ *Ibid.*

2.2. Racism as a worldview

Polish critics of racism have strongly emphasised that racism is not just a philosophical interpretation of the part of reality defined as race; it has a much greater power because it appears «as a worldview, since by explaining the nature of the world and the meaning of human life it attempts to give an ideological synthesis of reality and to delineate a line of conduct in life»⁶⁵. An important feature of a critical discourse on racism as a worldview is to see that, in explaining the concept of worldview, Nazi theorists changed its characterisation as a concept. This fact was emphasised by Pastuszka, among others, who found it most nonsensical that «racism deprives worldview of its casual and arbitrary character and regards it as a necessary function of race and blood»⁶⁶. While acknowledging that the religious element is not always dominant in a worldview, he argued that the leading role is played by an intellectual element derived from the natural sciences, the humanities or metaphysics⁶⁷.

In the critique of racism as a worldview, other absurdities were discovered, particularly in relation to its social, political and cultural role. These were pointed out by Father. Wincenty Granat when he said that it was absurd that this new worldview of the Nazi state, like the worldview of the Bolshevik state, took over all affairs. And the greatest absurdity and at the same time novelty is that the dogma of God was replaced by the dogma of man. Granat foresaw the tragic consequences⁶⁸ even before the German genocide of the 'inferior' races.

Polish philosophers and theologians argued that, from the point of view of Catholic culture, the change of worldview that took place in Germany in the 1930s was an abuse that transgressed and broke the boundaries of Latin civilisation. This was because

The source of the Catholic worldview is dogma – the truth of the faith; the Church defends revealed truth. Human reason can know the existence of God by its own powers, [...] in the act of faith the truth is received by reason under the influence of God's will and grace⁶⁹.

It was assumed that dogmas were of obvious importance in shaping pedagogical theories and practices, and that the truth of the Gospel did not separate people from life, nor did it lead them astray, but on the contrary, it provided for the fullness of life. Such a position was rejected by the Nazis. In the words of Granat: «The theorists of racism, which is an irrationalist system per

⁶⁵ Pastuszka, *Filozoficzne podstawy rasizmu*, cit., p. 162.

⁶⁶ *Ibid.*

⁶⁷ *Ibid.*

⁶⁸ W. Granat, *Zasady pedagogii katolickiej w świetle dogmatu odkupienia grzechu pierworodnego*, «Miesięcznik Katechetyczny i Wychowawczy», vol. 1-2, 1939, pp. 26-27.

⁶⁹ Granat, *Zasady*, cit., p. 27.

excessum, try to construct a new system, a new faith and a new view of life and its goals by means of historical, biological and philosophical ruptures»⁷⁰.

Such an approach was negated all the more because, from a (neo)Thomist and personalist perspective, a worldview is the result of free choice, personal reflection or study. Catholic intellectuals completely rejected the opposite proposition inherent in racism. They claimed that having roots in a particular race only contributed to the initial formation of the individual, whereas for racists a worldview is non-individual, even though it is expressed by the individual originating from the race; as a result, the nation and the race are eternal⁷¹.

The Nazis assumed that racial differences ran deep into psychic life and that, therefore, each race had:

- its own individual way of thinking, so that consequently no science can deviate from the main tone of the worldview;
- its own worldview – the Aryan world is different from the non-Aryan world; the core of its worldview is biological pantheism (the universe as life pervades all being, which, like particles, share the destiny of the whole);
- sources of action – life activity grows from the same soil as thought, from race;
- sources of religion – religion is a product of the race; idealism is emphasised, as is the validity of ideas and fidelity to them;
- Nation and State – are an obvious function of race – as Pastuszka found in Heyse, Hitler, Sombart, Krieck and Rosenberg;
- the focus of this worldview shifts from the state to the nation because it can be opposed to any universalism that recognises the racial equality of human beings;
- views of marriage – based on racial principles, marriage is a condition for the health of the nation (a woman's role in marriage is to concentrate on motherhood, all other aspects, e.g. scientific, professional or political, harm the female maternal side and hence the nation)⁷².

According to Pastuszka's critique, these distinctions of the racist worldview form its ideals and moral norms. Its adherents apparently believe that they are entitled to superiority over all other worldviews. In some of Pastuszka's texts quoted here, he takes the position of a scholar discussing ideologies that order the world according to their own vision. In this case, however, he gives a diagnosis of their real characteristics⁷³. There are also texts in which he

⁷⁰ *Ibid.*

⁷¹ Pastuszka, *Filozoficzne podstawy rasizmu*, cit., p. 163.

⁷² *Ibid.*, pp. 171-172.

⁷³ *Id.*, *Rasizm jako światopogląd*, cit., pp. 101-116.

criticises this phenomenon from the perspective of Christianity⁷⁴ as a religion. Pastuszka shows the racial character of all the phenomena common to German culture in the late 1920s and early 1930s⁷⁵. In his interpretation, racism is so pervasive in Germany that no science is autonomous or attempts to deviate from its core narrative. Its creators are said to nurture the belief that some special emotional elements are inherent in race. And the Nordic element is said to give science its peculiar and German-specific facet⁷⁶.

Polish writers of the time reflected on the groundbreaking nature of the third decade of the Twentieth century and the inevitability of cultural change as a consequence of the racist worldview. These were characterised by a high level of dynamism and an expansive political agenda. The elements of change were short-lived, as if external expansion had exhausted their internal power. Such observations were also made by Pastuszka when he embarked on an analysis and critique of racism. He gave a comprehensive account of racism as a worldview, while pointing out a number of dangers inherent in it. He believed that the ideological elements it contained elements of evil:

- racism, as a biological theory, postulates eugenics, including negative eugenics; it is a kind of messianism with a mystique of the German national soul and a desire for power;
- racism is a historiosophical direction describing the role of nations in the creation of culture; it is a political programme proclaiming the supremacy of the Germans and the taking away the rights of other nations, a point that Stojanowski⁷⁷ and other critics emphasise above all;
- racism is intolerant of other worldviews, it demands unconditionality for itself;
- racism is seen as universal, uncompromising, dogmatic and with pseudo-religious elements⁷⁸.

In the inter-war period, such diagnoses of the development of racism were of social significance, bringing the Polish reader closer to the picture of events abroad. Strong voices of warning were raised by writers critical of racism, as exemplified by Michalski's statement:

A demon of blood is ruthlessly awakened from its thousand-year sleep, while our eyes are closed to what it unites from above as cultural heritage. Once the demon is finally awakened, nations and states will begin to disintegrate, with the Third Reich at the forefront:

⁷⁴ Id., *Krytyka światopoglądu rasistowskiego*, cit., pp. 305-320.

⁷⁵ Id., *Filozoficzne i społeczne idee A. Hitlera (Rasizm)* (completed), «Ateneum Kapłańskie», vol. 41, 1938, book 1, pp. 23-37.

⁷⁶ Id., *Filozoficzne podstawy rasizmu*, cit., p. 165.

⁷⁷ Stojanowski, *Rasizm przeciw Słowiańszczyźnie*, cit.

⁷⁸ Pastuszka, *Rasizm jako światopogląd...*, cit., p. 102.

the choice remains between the primacy of spirit from above or the primacy of blood from below as the leaven of history. It's about primacy, not exclusivity⁷⁹.

Polish critics have identified a variety of justifications for racism among its German founders. These were found in distant times or strange places in history. Michalski cites Rosenberg's absurdly racist account of the Bolshevik Revolution:

Bolshevism was able to triumph because the Russian people declared themselves in favour of love and against honour. In the West, too, the idea of Christian love penetrated as a slogan of life, but time and again a rebellion of blood and honour broke out, whereas in Russia love, together with pity and humility, stood for the weak, the worthless, the sick and the criminal⁸⁰.

If this is the diagnosis of the German spirit of the 1930s, there is no longer any need to justify the German *drang nach Osten* as a supposed privilege due to them.

2.3. *Blood (race) – land – state: the main categories of German Nazism*

National Socialism created the 'grandiosity' of the German people. This claim was secured multilaterally by the idea of blood (race) and the indispensability of soil (living space). Michalski wrote that for Nazism, the idea of blood and soil together constituted what Germans called the nation's inevitable fate, its destiny.

It is in the blood that the past, the race, the constitution, the destiny and the character of each man are born. It is from the soil of the fatherland that the vital forces of individuals and nations flow; it is from it that the bonds that unite the whole cosmos are born, just as it is from blood that the bonds that unite the succeeding generations in history are born. The destiny of the German nation was fulfilled by the Nazi revolution⁸¹.

Given the German mentality, this statement is bitterly ironic; it is a tragic, paraphrased vision of the near future in which Germany, Poland's neighbour, is preparing a plan of annihilation for Poland.

All this happened in the real absence of any scientific justification for racism. Jerzy Ryx said that it was erroneous and unscientific to insist that the human races differed anatomically, physiologically or organismically. To allow the

⁷⁹ Michalski, *Tomizm wobec...*, cit., p. 10.

⁸⁰ Id., *Gasnące blaski*, Kraków, «Czas», vol. 8, 1934, p. 11. Exposing the ways of thinking of the founders of National Socialism is an unmasking procedure deliberately used by Michalski.

⁸¹ K. Michalski, *Fermenty religijne w Trzeciej Rzeszy*, «Przegląd Powszechny», vol. 201, 1934, pp. 351-352.

question of racial purity to come to the fore could only be considered alongside a desire to perpetuate positive human qualities. But here, Ryx emphasises, the congealing of a race within itself can only lead to the outgrowth of a race or nation. Ryx called this homozygote fixation negative, and in his discussion he also used many other biomedical terms that were used at the time to justify racial theories. He condemned any attempt to maintain the purity of blood (race) and criticised the very concept of blood used in the ideology of racism. It is not the blood but the chromosome that carries the genes. Similarly, the soul and religion, which are of divine origin, cannot be racial. The concept of race should not be ascribed any law of origin or any measure/rank, let alone the highest or the lowest. On the contrary, if any degeneracy afflicts a race or nation, it can be counteracted by interbreeding with races with positive characteristics⁸². The German National Socialists did not see this error.

Another error of racism is to see race as the source of inspiration for the emergence of the state. According to Ryx, this is a historical error, because it is the individual or group of individuals who recognise that a state is necessary for them. Only individuals grouped together as a collective have the natural right to determine their own destiny and to give it the form of a state. The primacy of racism, in the sense of fulfilling the role of justifying German National Socialism, also came to the fore in the attempt to reconstruct a programme for the state, Hitler's political programme⁸³. Using *Mein Kampf* as an example, the anonymous author (S.M.) showed how broadly racism was understood. It did not only refer to Jews or non-white races but appears as a state-forming element. The author of «Przegląd Powszechny» claimed that Hitler hated Austria because it was becoming «more and more like a Slavic state», which was favourable to the ruling dynasty⁸⁴.

Finally, some critics of racism have pointed to the very existence of the Germanic (Nordic) race, arguing that it is wrong to make race a constitutive element of a state or nation. «The Germans are wrong» says Ryx, «to think of themselves as a purely Nordic race; after all, the Scandinavians have more of its characteristics. Other races, too, such as the Romance or the Slavic, could aspire to all the qualities that the Nordic race does not have (or has less of). Finally, in Germany, the constant influx of southern races (Romance, Mediterranean, Jewish) has produced a conglomerate so diverse that it is impossible to speak of a pure race. The characteristics of today's Germans are only somatogenic, i.e. they are the result of a uniform style of diet, education and exercise. These characteristics are subject to rapid change, as the rapid Polonization of Germans arriving in Poland shows. In Ryx's view, the ease with which the Germans have assimilated into a foreign culture is evidence of their genetic

⁸² J. Ryx, *Błędy rasizmu*, «Prąd», n. 35, 1938, pp. 339-349.

⁸³ S.M., *Adolf Hitler i jego program*, «Przegląd Powszechny», vol. 196, 1932, pp. 3-30.

⁸⁴ *Ibid.*, p. 10.

unsustainability. This side of the German race is known to its leaders, and they therefore remove the influence of other nations. Anthropologically speaking, Germans are not an original race – Hitler himself is a typical southerner. If today's racist ideology perpetuates certain characteristics of today's Germans that are desirable – good, bad or even criminal – the awakening of Germans from the theory of racism will be tragic»⁸⁵, he adds.

2.4. *Racism and the Christian culture of Europe*

Racism had hardly emerged as an isolated idea; Polish intellectuals understood it as part of a larger whole. Michalski related the religious context to the German Church, describing it as follows:

On its left wing burns the revolutionary bonfire of the Germanic Church, from which the subversive currents of the 'German Christians' flow towards the conservative Evangelicals and Catholics. A few years earlier, the Calvinist pastor, Professor Karl Barth, had warned of currents in which Christian principles could dissolve⁸⁶.

Michalski shared Barth's view, claiming that they would not only change Germany but begin the destruction of European civilisation. Such diagnoses were confirmed from time to time by significant events. In the spring of 1934, the editors of «Prąd» informed their readers that the Vatican, in a decree of 9 February 1934, had condemned two books: *Der Mythos der 20. Jahrhunderts* by Alfred Rosenberg and *Die deutsche Nationalkirche* by Ernest Bermann. It is significant that, contrary to previous practice, the Church authorities gave reasons for the condemnation, including the expression of socialism and racism.⁸⁷ This raises the question of the relationship between racial theories and Christianity, which appears in many of the texts cited here. In Poland, it was asked by Sawicki, among others, although the distribution of emphasis in his later answers varies. Overall, Sawicki argued that racial theories generally contained non-Christian elements. The following are some of the elements that contradict Christianity:

- naturalism and determinism (insofar as they deny the intrinsic nature of spiritual life and see human history as the result of racial characteristics);
- extreme relativism (in demanding a separate religion, ethics, etc., for each race);

⁸⁵ Ryx, *Błędy rasizmu*, cit., pp. 342-345.

⁸⁶ Michalski, *Fermenty...*, cit., p. 349.

⁸⁷ Quoted after «Prąd», vol. 26, 1934, p. 143; in the «Z kraju i ze świata» section, no author given.

- racial pride (non-recognition of the equality of the races);
- selfishness and racial antagonism⁸⁸.

Thus, the general answer to the question of the interaction between racism and Christianity – considered from a Catholic point of view – is negative: racist theories are alien to Christianity.

In 1933, the Polish nationalist Karol Ludwik Koniński wrote that a massive «stripping of the national imagination of Christian images for the purposes of racism, to be replaced by a cult of natural forces in mythological garb»⁸⁹ had taken place in Germany.

Meanwhile, an extensive informal education towards racism took place in Germany with many actual measures taken to achieve this goal. J. B. Fichte's speeches made to the nation after the defeat at Jena in 1807, when French troops were standing in Germany, were brought forward. Fichte referred to the Germans as the 'original people' (*Urvolk*) who maintained racial purity. This was accompanied by a return to Germanic mythology which, Koniński believed, was characteristic of the emergence of national ideas in Germany. Koniński found parallels with different events: it was also the case in the mid-19th century that national ideas were then accompanied by a fresh edition of the Grimm brothers' fairy tales, and J. W. Wolff founded the magazine «Wotan», which was reinstated in the 1930s. Koniński further recalled that this

Mythology is essentially also a disguised materialism, only of a different, more exaggerated kind, and is in any case an extreme naturalism shrouded in a fantastic haze, and as such is an expression of the fundamental secularisation of the spirit⁹⁰.

Jan Kuchta, an educator and employee of the Ministry of Religious Denominations and Public Enlightenment, wrote in a book published in Lvov in 1939 that race, nation and Hitlerism were the main concepts ruling Germany. He was not writing about German Nazism, but about «German racism and neo-paganism», which had defined the political and cultural situation created by replacing God with new idols: race and nation. He drew this conclusion, he explained, from reading the works of Rosenberg, Bergmann, Hauer, Kriek, Fichte and others. His excellent knowledge of the current state of development of German philosophical, ideological, social and political thought led him to adopt the position of a humanist who warned and protested against the emerging racism (Dr Kuchta disappeared without a trace in the first weeks of the Second World War).

The sources cited above clearly point to the anti-Christian (anti-religious)

⁸⁸ Sawicki, *Nowoczesne teorie rasowe*, cit., pp. 20-21.

⁸⁹ K. Koniński, *Logika swastyki*, «Przegląd Powszechny», vol. 197, 1933, p. 307.

⁹⁰ *Ibid.*, p. 309.

origins of racism. On the basis of Christian theological thought, voices were heard which explicitly referred to racism. Michalski was one of the few critics of Nazism whose assessment of the political landscape in Germany evolved. His 1935 work *Tomizm wobec współczesnej filozofii dziejów*, which was originally presented as a paper at the International Congress of Thomistic Philosophy in Poznań in August 1934, is one of the mildest critiques of racism and the most cautious predictions of its future consequences. At the time, Michalski did not seem to believe that such barbarism was possible in the «great» German culture, even though its anti-Christian character aroused the worst fears. He wrote of a German hierarch's attempt to defend Christianity against the spread of racism as follows:

Four questions were raised by Cardinal Faulhaber⁹¹ in his great speech to German Catholics. He asked what the Germanic tribes were like before Baptism, what Germania gained from Baptism, whether Christianity was against race, whether it killed folk creativity and folk customs. With Tacitus in hand, he proved that Germania had its advantages and disadvantages before baptism. It is true that people lived in polygamy, that the blood of human sacrifices was shed on their altars, that slavery, revenge, laziness and drunkenness prevailed – all this is true, but it is also true that they did not break their word to their chiefs and that they kept the purity of their hearths.

Christianity came to the Germans to intensify each of their advantages and to remove their shadows. The cross introduced the great idea of love between the tribes that were killing each other, and for the first time united them into one powerful nation. [...] to unite under one banner of love 50 tribes that had previously been enemies. The Church does not ask races and nations to renounce their differences, their blood, but she does ask them not to hate each other's blood. The Church does not defend the purity of race, but she opens our eyes to our duties towards the soul. These fundamental thoughts and the great defence of the Old and New Testaments in the face of attacks from the left wing proved that there were inexhaustible religious forces in the German Catholic camp⁹².

Despite Michalski's hopes for German culture, he did not return to them later. He unequivocally exposed the tragedy of events on the European stage and said that, unfortunately, German racism had taken a turn for the worse and the practical consequences would soon follow. Michalski stressed that the myth of Germanic blood also included the philosophy of their history as conceived by Rosenberg and Krieck and that «this is followed by the expansion of a new hierarchy of values, in which a kind of chivalric reverence, honour,

⁹¹ Michael von Faulhaber (born 5 March 1869 in Heidenfeld, Bavaria – died 12 June 1952 in Munich), German cardinal and archbishop, against Hitler's politics, <<https://www.britannica.com/biography/Michael-von-Faulhaber>> (last access: 15.12.2018). His input or even co-authorship in Pius XI encyclical *Mit brennender Sorge* published in 1934 warning and condemning against the National Socialism is widely acknowledged.

⁹² Michalski, *Fermenty religijne w Trzeciej Rzeszy*, cit., p. 366.

comes to the fore instead of Christian love»⁹³. The new ethics of the new people of the «most perfect» race came directly from there. This is also where the space for education would emerge... but already outside Christianity. The argumentation of Archbishop Faulhaber quoted above was considered by the Polish church hierarchs as a soft defence against Nazism. The behaviour of the German hierarchs and the proof of the uniqueness of the Nordic blood served to make it sound like a mysterium. They stood by their rejection of the main ideas of Christianity: sin, grace and mercy. The greatest rejection, however, was that of brotherly love, love for mankind. Following this line of argument, Koniński and Michalski said that racists were offended in the Sermon on the Mount not only by the idea of mercy, but also by the potentially equal value of every human being. They also recognised that Germanic mythology, with its glorification of the Germanic race, came into contact with the «socialist ferment» and took it up as a banner.

The fact that Rosenberg wanted to remove roadside crosses as unworthy of German religiosity and its cult of strength was not only pro-racist but also pro-socialist⁹⁴. The blood myth was thus able to grow deep, becoming a symbol and an internal component of National Socialism. At its core was also the philosophy of history as interpreted in the writings of Rosenberg and Krieck. In Michalski's interpretation, their message led to the conclusion that the moment had come for Germany to rewrite the history of the world, because until then the historical images had been pale, bloodless, and always based on a generalised concept of man.

In the diagnosis of this content found in the writings of Michalski, Koniński and others, there was both a defence of Christianity and a strong voice of warning to the world. It is worth noting that when Michalski wrote the text quoted here, Pope Pius XI had not yet issued the encyclical *Mit brennender Sorge* (14 March 1937), which dealt with the threat of racism. Importantly, it was not only the teaching of the Catholic Church that protected Poles from the influence of racism. The thousand-year-old traditions of Polish culture also came to the fore – starting with Paweł Włodkowicz, who had already argued for the subjective rights of man at the Council of Constance (1414-1418)⁹⁵.

⁹³ Id., *Tomizm*, cit., p. 10. What is significant today – from the Polish point of view – is that Germany, having lost the First World War, wanted to rewrite its history. They will return to this idea again after the unleashed and lost Second World War and again write their history of alleged war «sacrifices» and share the responsibility for their crimes with the Polish people, who are the most victimised by them.

⁹⁴ Koniński, *Logika swastyki*, cit., pp. 305-306.

⁹⁵ L. Korporowicz, *Polskie korzenie prawa narodów w budowaniu podmiotowości wspólnot kulturowych*, in R. Wiśniewski (ed.), *Eseje o Niepodległej*, Warsaw, NCK, 2018, pp. 103-127.

Summary: The cultural-ideological dimension of the Polish critique of racism

We owe to Father Pastuszka the most profound analyses among the conservative and Catholic sources, and at the same time a fully scientific presentation of racism with a critique of its biological justifications⁹⁶. In the third part of his series on racism in the pages of *Ruch Katolicki*⁹⁷, he published a critique of the historiosophical justifications, arguing that not only biological racism was important for the Germans, but above all historiosophical racism, which seemed to reach the common man more easily. The biological variety of German racism was not only about the biological purity of the race, but also about its spirit – for the Nazis, the spirit of the nation was a function of blood⁹⁸. Drawing on a very wide range of sources, Pastuszka concludes that the Nazis emphasised the need for all kinds of racism to have an impact: especially through science and culture and, during Hitler's reign, through legislation and the repressive apparatus of the state. Among the most ardent popularisers of racism, Pastuszka mentioned the scientific journal *Die Nationalsozialistischen Monatshefte*, published in Munich since 1927. Pastuszka claimed that the dissemination and popularisation of racism in Germany was aided by the work of Richard Wagner, who considered racism to be the greatest scientific discovery of the Nineteenth century and gave prominence to Nazi ideas in his own work⁹⁹.

Józef Pastuszka's descriptive and analytical narrative shifting to a profound critique of racism and other Nazi phenomena of differ significantly from the texts of the eminent scholar, philosopher and theologian of the Jagiellonian University, prof. Konstanty Michalski, who was also critical of Nazism. This medievalist, much respected across Europe, and a representative of the Polish intelligentsia, struck a tragic tone when speaking on topical issues, perfectly reflecting the extent of National Socialism's deviations from the most important ideas of Christian civilisation.

On racism, Michalski stressed that it was prior to National Socialism. He wrote: «Out of psychological anthropology, out of human race and blood, the myth is born in Germany in which the whole mission of the German people is to be summed up»¹⁰⁰. How small this undertaking is, how low the Germans have fallen, we can learn from the totality of the message that this eminent philosopher gave in his work *Nieznanemu Bogu* (Kraków 1936), which in this symbolic title (To the Unknown God – transl. note) captures the message of

⁹⁶ Pastuszka, *Rasizm jako światopogląd*, cit., pp. 102-116.

⁹⁷ Id., *Krytyka rasizmu*, cit., pp. 305-320.

⁹⁸ Id., *Współczesne prądy filozoficzne*, «Kultura i Wychowanie», vol. 3, 1938, p. 207.

⁹⁹ Id., *Rasizm jako światopogląd*, cit., p. 103.

¹⁰⁰ K. Michalski, *Trzy mity*, in Id., (ed.), *Nieznanemu Bogu*, Kraków, Naukowy Instytut Katolicki, 1936, p. 28.

the totalitarianisms of the time – German Nazism, Soviet Communism and Italian Fascism. The reading of the message of the German socialists, which included the category of race, is a big question. For whom and for what purpose did socialists of different origins unhesitatingly sacrifice millions of people (in Soviet Russia, China, Spain, later in Poland, Germany), while playing a total and global game?

The most creative role in the implementation of racism was played – not only according to Michalski, but also by Koniński, Podoleński and others – by Alfred Rosenberg. As Karol Ludwik Koniński wrote explicitly:

Alfred Rosenberg, that Kurland nobleman, in *Der Mythos des 20 Jahr* (1930) created a ‘blood myth’ – that is, a new German faith, which boils down to pseudo-scientific evidence saying that Nordic blood is what will overcome and replace the old sacraments¹⁰¹.

¹⁰¹ Koniński, *Logika swastyki*, cit., p. 306.

Examination of Old Age Representation in Picturebooks: Inquiring Stereotypes, Embracing Diversity

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ABSTRACT: Representation preferences are at the core of picturebooks since they often prime children's perception about the world. More specifically, the representation of old age holds especial importance, as it shapes perceptions that influence attitudes towards aging, subsequently impacting the manner in which individuals age. Depictions of old age have the capacity to impact intergenerational relationships and the overall well-being of older adults within societies. In this article, we examine depictions of old age in contemporary Turkish picturebooks published between 2013 and 2023. The study aims to assess the verbal and visual narratives of selected picturebooks from a pluralistic perspective. We mainly examine how these books reflect diversity and promote positive attitudes towards aging. In our content analysis, we looked for various facets of portraying old age such as role, environment, outlook, and experience. We recorded repetitive patterns for positive and negative stereotypical features that at times lead to a similarity in depictions of old age. We discuss ways to further empower or empathize with old-age characters, and hence support constructing affirmative attitudes towards aging. Thus, we propose a guide chart to promote pluralistic strategies for varied depictions of old age.

EET/TEE KEYWORDS: Picturebooks; Diversity; History of visual; Literature; XXI Century.

Introduction

With the increase in the old-age population across societies, aging has become an important topic and gained visibility. People over the age of sixty were once categorized as a homogenized single group, stigmatized as dependent, weak, and without many possibilities, whereas today positive attitudes are on the rise. For instance, the World Health Organization has updated its definition of old age. According to the World Health Organization, aging can result in some damage in terms of physical and mental resonances over time, but such changes cannot be generalized. In their report published in 2022, they stated as «There is no typical older person. Some 80-year-olds have physical and mental capacities similar to many 30-year-olds»¹. Thus, it is important to appreciate the variety of old-age characteristics and the varied life experiences of older people. A recent study highlights the importance of how old people are represented and suggests constructive approaches enriched by research and practice, because such approaches may affect older adults' quality of life². Moreover, research has found that older people who held more positive views about aging, live longer than those with less positive views on aging³. Exposure to ageism affects older adults adversely⁴. After being exposed to cultural stereotypes about age throughout their lives, older people tend to internalize these stereotypes, thus attitudes towards aging play a major role in how well people age⁵. Myriad media including TV programs, magazines, newspapers, films, and books shape our perception of aging and of being an older adult. In this respect, children's books, specifically picturebooks, play an influential role as they are most likely to be the materials to which children are exposed when constructing an initial perception of the world. Bandura's social learning theory⁶ emphasizes the impact of actual or fictional media characters that inspire children and might affect their perceptions towards aging⁷. Thus, picturebooks help children in their understanding of varied characters and char-

¹ World Health Organization (WHO), Ageing and health, 2022, <<https://www.who.int/news-room/fact-sheets/detail/ageing-and-health>> (last access: 10.04.2024).

² H.J. Swift, B. Steeden, *Exploring Representations of Old Age and Ageing*, Project Report, Center for Ageing Better, 2020, <<https://www.ageing-better.org.uk/sites/default/files/2020-03/Exploring-representations-of-old-age.pdf>> (last access: 10.05.2024).

³ B. R. Levy, M.D. Slade, S.R. Kunkel, S.V. Kasl, *Longevity increased by positive self-perception of aging*, «Journal of Personality and Social Psychology», vol. 83, 2002, pp. 261-270.

⁴ B. Levy, *Improving memory in old age by implicit self-stereotyping*, «Journal of Personality and Social Psychology», vol. 71, 1996, pp. 1092-1107; B. Levy, *Handwriting as a reflection of aging self-stereotypes*, «Journal of Geriatric Psychiatry», vol. 33, 2000, pp. 81-94.

⁵ Id., *Eradication of ageism requires addressing the enemy within*, «Gerontologist», vol. 41, n. 5, 2001, pp. 578-579.

⁶ A. Bandura, *Social learning theory*, New Jerse, Prentice Hall, 1977.

⁷ L. Hollis-Sawyer, L. Cuevas, *Mirror, mirror on the wall: Ageist and sexist double jeopardy portrayals in children's picture books*, «Educational Gerontology», vol. 39, n. 12, 2013, pp. 902-914.

acter traits. In addition, the images/ texts used for representation in children's books provide meaning and could play a vital role in forming attitudes toward aging⁸. With this in mind, we need to pay greater attention to evaluating children's books in terms of their representations of old age, seeking depictions that feed upon diversity. Confronted with similar portrayals of old age, children may develop conservative perceptions of what aging may be. As scholar Vanessa Joosen (2023) notes, age norms are not necessarily bad, and they can be akin to other norms in society that can help us navigate through life⁹. Nevertheless, these norms should not be restraining, as they can also change in time or from person to person. As such, what these norms may be is open to discussion and interpretation and altered under different case scenarios.

Compared to the past, awareness about depictions of older adults and aging seems to have evolved in a more favorable way. However, this tendency could lead towards positive stereotypes which could again limit diverse portrayals of being or getting old. In our article, we aim to uncover diverse portrayals apart from repetitive depictions, whether they present positive or negative stereotypical features. We examine Turkish contemporary picturebooks published in the last ten years through content analysis of visual and verbal narratives, to understand how the old-age characters are portrayed. We specifically look at different aspects of these depictions such as role, environment, intergenerational relationships, physical and personal traits as well as the plurality within the character. The study points out the importance of the relationship between the depictions of old age from different *facets* to examine diversity among the selected books. Moreover, the study investigates strategies on how representations can empower older adults, focusing on diverse features within the character. We also present a guiding chart that might encourage a diversity of depictions of old age in children's literature, in order to support children's flourishing understanding of age and the well-being of older adults. In our article, we first go through the literature on the transformation of old-age representation in children's literature. We then share our methodology together with our findings, followed by a discussion.

⁸ P.A. Crawford, S. Bhattacharya, *Grand images: Exploring images of grandparents in picture books*, «Journal of Research in Childhood Education», vol. 28, n. 1, 2014, pp. 128-144; S.L. McGuire, *Promoting positive attitudes toward aging: Literature for young children*, «Childhood Education», vol. 69, n. 4, 1993, pp. 204-210.

⁹ V. Joosen, *Age*, in C. Nelson, E. Wesseling, A.M. Wu (edd.), *The Routledge Companion to Children's Literature and Culture*, New York, Routledge, 2023, pp. 229-240.

1. *Depictions of old age in children's literature*

A study conducted by Edward F. Ansello, considered a seminal work, examines the representation of older adults in 656 children's picturebooks. Ansello scrutinizes these picturebooks according to the older character's presence, sex, racial composition, relationship to the main character, occupational role, and behavior¹⁰. Illustrations, physical and personality descriptions also contributed to these categories. The results provide evidence of ageism¹¹ in the ways in which the older adult characters are depicted. As such, older adults were less frequently illustrated compared to younger characters. Apart from the deliberate or unintentional ageism, the matter still carries a great importance, as these picturebooks are fundamental learning objects during children's literary socializing. They may establish a basis for children's attitudes towards that context¹². Thus, it is possible to enhance quality of life for the older adults in general by counteracting ageism and teaching young children realistic ideas about aging¹³. Therefore, early childhood educators also play a key role in combating ageism.

The attitudes towards age are formed not only through literary socializing channels but through a synthesis of the messages from overall cultural media, as children form their assessments about the concept of old age through a blend of «direct concrete and indirect vicarious experiences»¹⁴. Thus, the nature and the content of the attributes are often based on media experiences¹⁵. The repetitive behaviors and descriptions of the older adult characters in the cultural media may restrict creative thinking, leading to a materialization of similar products and works. Developmentally appropriate classroom material about older adults' positive aspects, abilities, and social characteristics makes a positive impact on preschool children's perception. In return, older adults' abilities rather than their personal traits were more impactful in building positive attitudes towards them on the part of children. Based on their findings, Blunk & Williams (1997) suggest highlighting the strengths of older adults in order to constructively support children's impressions¹⁶.

¹⁰ E.F. Ansello, *Age and ageism in children's first literature*, «Educational Gerontology», vol. 2, n. 3, 1977, pp. 255-274.

¹¹ Ageism is the systematic stereotyping of and discriminating against people due to their old age: R. Butler, *Ageism: Another form of bigotry*, «The Gerontologist», vol. 9, n. 4, 1969, pp. 243-246.

¹² M. Dellman-Jenkins, L. Yang, *The portrayal of older people in award-winning literature for children*, «Journal of Research in Childhood Education», vol. 12, 1997, pp. 96-100.

¹³ S.L. McGuire, *Counteracting ageism: Promoting accurate concepts about aging in young children*, in M. Renck Jalongo, P.A. Crawford (edd.), *Intergenerational Bonds*, Cham, Springer Nature Switzerland AG, 2021, Vol. 18, pp. 19-39.

¹⁴ Ansello, *Age and ageism in children's first literature*, cit., p. 262.

¹⁵ Dellman-Jenkins, Yang, *The portrayal of older people in award-winning literature for children*, cit.

¹⁶ E.M. Blunk, S.W. Williams, *The effects of curriculum on preschool children's perceptions*

Dellman-Jenkins & Yang (1997) analyzed the illustrations of older adults in picturebooks that received the Caldecott Medal, comparing those works published between 1972 and 1983 with those published between 1984 and 1995¹⁷. Their examination implied that the illustrations in the more recent works depict older adults with more positive and respectable attributes. This fact is also a sign of awareness on the part of the award jury, since the books' messages may shape readers' age-related biases. When we look at later studies in time, we see a continued positive trajectory. For instance, another study examined a selection of illustrated books on the «New York Times» Best Seller list, the Book Sense Best Seller list, and the Caldecott award winners, published between 2000 and 2010¹⁸. The study revealed important progress regarding positive representations of old age compared to previously conducted studies. Although underrepresentation of old-age characters was still detected, the overall results pointed to an optimism about promoting positive attitudes toward aging. Another study examining diversity among grandparents in children's books suggests that, over time, grandparent characters have increasingly represented a wider range of cultures. However, these depictions still show limited variety in terms of their employment, hobbies, and other aspects¹⁹. The subsequent studies present similar results with positive outcomes compared to previous studies, but still scholars point to the need for more work on this topic. Vanessa Joosen (2018) proposes that merging critical age studies with children's literature studies is necessary to reconsider the connection between children and older individuals²⁰. She also suggests that ageist stereotypes create challenges due to children's limited understanding of old age, which underscores the necessity of further studies (both analyses and empirical research) on the influence of age norms in children's literature²¹. Moreover, how old age is represented visually requires more attention as children's books might be influential to shape attitudes towards aging²².

When we look at old-age representations in Turkish children's books, older

of the elderly, «Educational Gerontology», vol. 23, 1997, pp. 233-241.

¹⁷ Dellman-Jenkins, Yang, *The portrayal of older people in award-winning literature for children*, cit.

¹⁸ J. Danowski, T. Robinson, *The portrayal of older characters in popular children's picture books in the US: A content analysis from 2000 to 2010*, «Journal of Children and Media», vol. 6, n. 3, 2012, pp. 333-350.

¹⁹ P.A. Crawford, S. Bhattacharya, *Grand images: Exploring images of grandparents in picture books*, «Journal of Research in Childhood Education», vol. 28, n. 1, 2014, pp. 128-144.

²⁰ V. Joosen (ed.), *Connecting Childhood and Old Age in Popular Media*, Mississippi, University Press of Mississippi, 2018.

²¹ Id., *Aging in children's literature*, in D. Gu, M.E. Dupre (edd.), *Encyclopedia of Gerontology and Population Aging*, New York, Springer, 2019, pp. 1-5.

²² S.L. McGuire, *Promoting positive attitudes toward aging: Literature for young children*, «Childhood Education», vol. 69, n. 4, 1993, pp. 204-210, S.L. McGuire, *Growing up and growing older books for young readers*, «Childhood Education», vol. 79, n. 3, 2003, pp. 145-151; Ead., *Counteracting ageism: Promoting accurate concepts about aging in young children*, cit.

characters are often seen as grandparents which is also supported by a recent study²³. That study points out that older characters are reflected by their social position rather than their personal characteristics. Grandmothers are self-sacrificing, caregivers, responsible for their stereotypical duties mainly in the home, whereas grandfathers are considered extrovert and kind, play with their grandchildren, and spend time in outdoor activities. The study states that predominant social gender perceptions are represented in most of the children's books. When examining other forms of media aimed at children, one study investigated the portrayal of intergenerational relationships in Turkish animated cartoons via a survey study based on grandparents' and grandchildren's views of each other²⁴. The study found that in recent domestic productions, older characters are mainly represented in similar patterns like in the role of grandparents, transferring didactic messages, and bearing most of the stereotypical features of old age. The study results show the inconsistency between what the contemporary audience wants to see and what the selected productions at times provide. The survey results also present insights such as the need for going beyond traditional idealized family portrayals, gender roles, or occupations, or adding more diverse and atypical features attributed to old-age characters. Similarly, a recent study investigating picturebooks published in Turkey between 2008 and 2018 shows that the diversity found in real life regarding physical traits, roles, and experiences of older adults, is not reflected in the books²⁵. The mentioned study also includes books from foreign authors translated into Turkish. However, we only focus on picturebooks produced within Turkey in order to analyze the local context in depth. In the next section, we will present our methods that shaped our study.

2. Sample and Analysis

We began to collect picturebooks in which older characters are one of the main characters. These picturebooks were published between 2013 and 2023 from online bookstores (idefix.com, pandora.com.tr, dr.com.tr, kitapyardu.com, amazon.com.tr). Our search terms were the Turkish words for «old man», «old woman», «grandmother», «grandma», and «grandfather». We

²³ Y.M. Yakar, H.D. Yılmaz, *Çocuk Kitaplarında Yaşlı Karakterler [Elderly Characters In Children's Books]*, «Zeitschrift Für Die Welt Der Türken / Journal Of World Of Turks», vol. 11, n. 1, 2019, pp. 165-83.

²⁴ E.G. Baykal, I. Veryeri Alaca, *Representations of intergenerational relationships in children's television in Turkey*, in V. Joosen (edd.), *Connecting childhood and old age in popular media*, Jackson, Mississippi, University Press of Mississippi, 2018, pp. 207-227.

²⁵ C. Avcı, G. Erhan, *Ageing versus active aging: how old age is represented in children's books*, «Educational Gerontology», vol. 48, n. 4, 2022, pp. 145-159.

searched for these words in the book titles, summary, and content. Our ultimate goal was not to define the characters as «old», rather we aimed to investigate the portrayals of the characters who are labeled «old». We also visited the Istanbul Book Fair and local bookstores (Remzi, D&R, Tirtıl Bookstore, etc.). We searched online blogs, websites, and Instagram and found books by referrals. We omitted translated books and instead focused on those that were produced in Turkey. As a result, we reached 160 picturebooks and selected 48 from among them. We excluded picturebooks according to our specific selection criteria that we will elaborate on below. Thus, we included in our selection picturebooks that have at least one visual of an old-age figure. We chose picturebooks that have an older adult as one of the leading character, and we excluded picturebooks mainly consisting of nonhuman characters and didactic content. We also excluded illustrated books, as we focused on picturebooks in which image and text have a balanced share in the story. Moreover, if the picturebook was a part of a series, we picked only one book instead of the whole series. Even though we studied over one hundred picturebooks for this article, our sample was to a degree limited due to the source channels and keyword search. Further studies in collaboration with publishers could help in broadening out to more picturebooks involving this specific content. Accessing picturebooks through special library databases seemed a necessary step to find the right children's books in a more systematic way. Libraries that have children's books with extensive keywords may be helpful, as research into this topic has been increasing rapidly in recent years, highlighting the significance of this issue.

We utilized an approach combining quantitative and qualitative content analysis. We initially benefited from McGuire's form²⁶ which she developed for evaluating old-age characters in children's books to set up our initial code sheet, which we then extended after the first round of reviewing the selected books. We sought diverse representations rather than just positive or negative ones mentioned in the existing literature, including in McGuire. We did not associate features such as gray hair, wrinkles, wearing glasses or illness with negative traits, as we considered these a neutral part of the course of aging and life. Here, we map whether these features are repetitively used or not as there are also older people who prefer coloring their hair or more healthier than some younger people. For personal and physical traits, we benefited from a measurement instrument used by Danowski and Robinson²⁷ which they formulated and adapted from Robinson and Anderson (2006)²⁸.

²⁶ McGuire, *Growing up and growing older books for young readers*, cit., pp. 145-151.

²⁷ J. Danowski, T. Robinson, *The portrayal of older characters in popular children's picture books in the US: A content analysis from 2000 to 2010*, «Journal of Children and Media», vol. 6, n. 3, 2012, pp. 333-50.

²⁸ T. Robinson, C. Anderson, *Older characters in children's animated television programs:*

The stereotypical features which are mentioned by scholars to define old age are white or gray hair, wrinkles or sagging of skin, balding, use of a physical aid (e.g. a cane or wheelchair), or use of glasses²⁹. If the character has two or more of the aforementioned determiners, the character is defined as old. Hence, if we trace two or more attributives in the book, we assign the character as having stereotypical physical features. We also consider the body posture and clothes as other indicators for being classified as old. For reliability, two independent coders (the first and second author of this paper) reviewed the picturebooks with the guidance of a coding sheet and discussed the evaluation results together to ensure objectivity.

The coding instrument helped us to analyze selected picturebooks under five major categories: 1) Role & environment, 2) Personal traits & lifelong experience, 3) Intergenerational relationships, 4) Physical traits, and 5) Illness and death. We started by making observations on the role, occupation, environment, and activities that old people are associated with. We then looked at personal traits and the reflection of lifelong experience in the respective picturebook. Third, we studied the aspects of intergenerational relationships as depicted in the picturebook. As a fourth category, we analyzed how physical traits are illustrated. Finally, we checked whether the narrative contains the issue of illness and death. We will reflect on our findings based on these five categories in the next section.

Results

For the results, we share the representation analysis of 48 picturebooks regarding old age. Our reflections are based on repetitive patterns that emerge and become visible in many picturebooks in our selection. We also point out unique strategies that present original means of representing old age in the following discussion section.

A content analysis of their portrayal, «Journal of Broadcast and Electronic Media», vol. 50, n. 2, 2006, pp. 287-304.

²⁹ Idd., *Older characters in children's animated television programs: A content analysis of their portrayal*, «Journal of Broadcast and Electronic Media», vol. 50, n. 2, 2006, pp. 287-304; J. Danowski, T. Robinson, *The portrayal of older characters in popular children's picture books in the US: A content analysis from 2000 to 2010*, «Journal of Children and Media», vol. 6, n. 3, 2012, pp. 333-350; J.M. Bishop, R.D. Krause, *Depictions of aging and old age on Saturday morning television*, «The Gerontologist», vol. 24, n. 1, 1984, pp. 91-94.

3. Role & environment

Since we used search terms «grand-, old, etc.», old-age characters have a significant active role in the picturebooks that we selected, except for two books. In these two books, the old characters are already dead in the course of the story and they are recalled by other characters. In rest of the books, we mainly see old-age characters in supportive roles for children. In 21 picturebooks (43%) old-age characters are the main protagonist of the story and 14 picturebooks (29%) focus on the old-age characters' life or their perspective specifically although most of the books were found via old age-related keywords search. In most picturebooks, we see old-age characters as grandparents which is expected as we have found many books via keyword search of grandmother, grandfather or synonyms of these words. We should also note that, in most picturebooks old-age characters are referred to as «grandmother» or «grandfather» even if they don't have grandchildren; these words can be used as adjectives to address older people in Turkish, as in many other cultures. Only 15 books (31%) present old-age characters who are not grandparents.

When we look at the roles, old-age characters are depicted often as grandparents (70%). Eight percent of the books presenting old-age characters as working people such as bird-food seller, hot-air balloon operator, hairdresser, or librarian. Although in these books three of these characters are dubbed «grandfather», in the story they are not a family member, rather the word «grandfather» is used as an adjective referring to their old age, as mentioned previously. Only one book depicts old-age character as «father» or «mother» rather than «grandparent» (2%). The rest of the books (29%) present an old-age character in other roles apart from family members or working people in the story.

Besides their roles, old characters are mostly 23 (49%) found in environments such as their home, garden, or neighborhood that they live in. In the remaining picturebooks, the reader comes across other environments as well, including the schoolyard, tennis court, museum, nature, public transportation, or library. Hence, environments could be varied rather than repeatedly taking the home or neighborhood as the location of the story.

Tab. 1. Activities older characters involved within their roles

Activities	percentage	number of books
Storytelling	35%	17
Cooking/kitchen/housework	33%	16
Animal care	29%	14
Playing games	20%	10
Gardening/Plant care/Farming:	18%	9

Teaching/ guiding	14%	7
Riding Motorbike/ bicycle	10%	5
Dancing& singing song	10%	5
Repair/ upcycle	8%	4
Sportive activities (including extreme sports)	6%	3
Playing music instrument	2%	1

In the selected books, when we examine activities [Tab. 1] storytelling is the most common activity among the old-age characters, followed by cooking and household chores. Another prevalent activity depicted in the books is interacting with animals. Additionally, gardening and farming tasks are present in almost one-fifth of the books. Playing games and teaching new things or finding solutions are the other common activities depicted in the picturebooks. The less represented activities are riding a motorbike/bicycle, dancing/singing songs, repairing/upcycling, doing sports (including extreme sports), and only one book depicts old age playing an instrument.

4. *Personal traits & lifelong experience*

Tab. 2. Personal traits of older characters in the selected picturebooks

Personal Traits	percentage	number of books
happy/content – friendly – loving/caring	83%	40
intelligent/wise	18%	9
lonely/recluse	12. 00%	6
helpless	12%	6
eccentric	8. 00%	4
angry/grumpy/stern	4. 00%	2
humorous	4. 00%	2

Upon analyzing the personal traits of old-age characters in the selected works [Tab. 2], we noted that a significant majority of the books depict positive characteristics. Specifically, the old-age characters are portrayed as happy, loving, and friendly in approximately 83% of the books, followed by those depicting their wisdom in 18% of instances. In contrast, characteristics typically viewed as negative in connection to old age, including helplessness, loneliness/reclusiveness, anger, or being an object of ridicule are less frequently depicted when compared to positive characteristics. Out of the 48 picturebooks, only four feature unconventional eccentric old-age characters engaged in activities

like extreme sports, enjoying solitude, or learning ballet. Hence, only two books introduced humorous older characters in their narrative.

In relation to personal traits, we also looked for transmission of the lifelong experience of older characters. In this, we were interested in knowing whether the readers could learn more about the characters' personal trajectory of life or not. One fourth of the picturebooks (12) reflected characters' previous life experiences such as their joyful moments, mastering of a certain skill, success or failures, and inherent preferences in their life.

5. *Intergenerational relationships*

Tab. 3. Depiction of intergenerational relationships in selected picturebooks

Nature of Intergenerational Relationships	percentage	number of books	notes
Positive	89%	43	
Negative	2%	1	
Not mentioned	8%	4	
One way share (Old > child)	27%	13	teaching, guiding, storytelling
One way share (Child > old)	6%	3	help (navigation, physical help, reading newspaper..)
Reciprocal share	8%	4	Child learns or gets support from old age, and old age learns or gets support from old age at different times
Mutual – (synchronous)	50%	24	Actions done together: playing together, dancing together, making together, etc.

We examined the nature of intergenerational relationships in these books [Tab. 3]. We first examined whether the entanglements between children and old-age characters are positive, negative, or not mentioned. We then continued our analysis by closely inspecting these bonds to see if they are one-way, reciprocal, or mutual (synchronous) relationships. Almost all books presented a positive intergenerational relationship. There was merely a single book depicting a negative relationship (not sharing pleasant moments together) and four books did not mention an intergenerational relationship due to the lack of child characters or interactions. When we look at the positive relationship in depth, half of the books depict a mutually shared activity which both parties enjoy synchronously, such as playing games, dancing, upcycling, or caring for animals together. There are also instances of one-way sharing and examples of reciprocal relationships that the story characters have via different activities. In four books, readers can witness a reciprocal relationship such as a child

delivering medicine to the old character and the old character preparing the child's favorite meal, or the child teaching how to somersault to the older character and the older character teaching the child knitting but at different times. Teaching one another is valuable, granting both generations knowledge and a sense of delight. In some books we see only a one-way transfer from the old character to the child or viceversa. In many cases, we see a relationship where the old character tells stories or recounts his/her memories to the child. In few books, we see a one-way relationship in which the child is the transmitter of information to the older adult in navigation or delivery of goods.

6. *Illustration of physical traits*

Tab. 4. Illustration of older characters in selected picturebooks

Illustration of Old age	percentage	number of books
Stereotypically illustrated: if the character carries at least two/three feature of listed ones, we define it as a stereotypically illustrated: white/grey hair, wrinkles or sagging of skin, balding, use a physical aid (cane or wheelchair), use of glass, not fit (roundy/extra thin), hatched over	72%	35
Hair		
white/ grey hair	89. 50%	43
other colors (blue-black, orange, pink-yellow, no color)	10%	5
Clothes		
Dressing tendency: pale or dark colors versus colorful, unfashionable outfits versus fashionable	46%	22
modern/sports outfit	35%	17
traditional clothes (wearing folkloric clothes or accessories)	10%	5

In the search for a plurality in the illustrations, it was critical to understand the stereotypical ones that we previously mentioned. Thus, we examined how older characters are illustrated physically [Tab. 4]. As such, we employed the aforementioned list of aspects used in literature to map old age in order to frame the stereotypical tendencies. We then looked at the stylistic appearance of the illustrations which was an additional aspect to reflect diversity.

We scanned these features in each picturebook and marked it as stereotypical especially if the character bore more than one of the following: white/gray hair, wrinkles or sagging of skin, balding, use of a physical aid (cane or wheelchair), use of glasses, or round/hunched over shape. In the vast majority of picturebooks, the illustrations of old age came with clichés. For instance,

as we examined each picturebook we found that almost all old-age characters had white or gray hair. When we examined the styles of clothing, we came across outdated clothes in almost half of the books. Modern or sports outwear is depicted in 35% of the books, a ratio that closely aligns with those portraying characters in unstylish clothes. Only five books depict traditional clothes of a specific regions in Turkey.

7. *Illness/death*

Tab. 5. Depiction of illness/death in relation to old age characters in selected picturebooks

Illness/ death association	percentage	number of books
Death	14. 50%	7
Serious Illness (who has to stay in bed, not standing)	2%	1
Mild cold	2%	1
Forgetfulness	12%	6
Immobility	2%	1
Total	33%	16

Of the selected books, 33% of them depict a difficult subject such as death, illness, or negative health conditions. An examination of the narratives concerning illnesses, excluding death, reveals that only one book portrays a significant illness necessitating the older character's hospitalization. Additionally, another book portrays a mild cold that the character eventually recovers from. Furthermore, there is a representation in one book of the older character as immobile, consistently in a seated position. Forgetfulness, which could be considered one of the stereotypical aspects of aging, is evaluated under a character's personal traits³⁰. Hence, we analyzed this in tandem with illness and death due to its relationship with dementia, something that can be considered a serious illness especially in its latter stages. We note that in its earlier stages, we might see dementia as a condition that people can manage by themselves. In the selected books, we found that 12% of them depict older characters as experiencing memory loss, and some of these characters pass away following the onset of forgetfulness. Majority of the books depict old age healthy and active.

³⁰ T. Robinson, M. Callister, D. Magoffin, J. Moore, *The portrayal of older characters in Disney animated films*, «Journal of Aging Studies», vol. 21, n. 3, 2007, pp. 203-213.

Discussion

In this section, we discuss the results in relation to the diversity of representations of old age via the patterns we found. In addition, we elaborate on possible strategies for achieving variety in picturebooks in order to promote awareness and understanding towards aging and support better intergenerational relationships in societies.

Diverse depictions of old age in picturebooks

As Bishop (1990) states, «Literature transforms human experience and reflects it back to us, and in that reflection, we can see our own lives and experiences as part of the larger human experience. Reading, then, becomes a means of self-affirmation, and readers often seek their mirrors in books»³¹. She points out the importance of seeing one's self-reflection in the books. Do the representations reflect their grandparents or the old neighbor they often see? How do children react the first time they meet an old person who is not a grandparent? Do all old people have white hair and glasses?

The studies show that it is more difficult to change the perception of age after childhood³². The images used for representation in children's books provide meaning and play a pivotal role in forming attitudes towards aging and older adults. Therefore, how picturebooks reflect the real world is a serious issue that is worthy of attention from multiple perspectives. In a recent examination of depictions of old age in picturebooks available in Turkey, including translations, it was noted that the diversity in the physical attributes, roles, and experiences of older adults in real life was not adequately represented in the sample analyzed³³. This finding aligns with our own, as we also observed that many books showed a lack of diversity. According to our analysis, the majority of the older characters (72% grandparents, 89% white/gray hair, and only 8% actively working) were not represented in unique circumstances but with commonly recognized features. In addition, the older characters in our selected sample were involved in eleven different activities, but these were some-

³¹ R.S. Bishop, *Mirrors, windows, and sliding glass doors*, «Perspectives», vol. 6, n. 3, 1990, pp. 9-11.

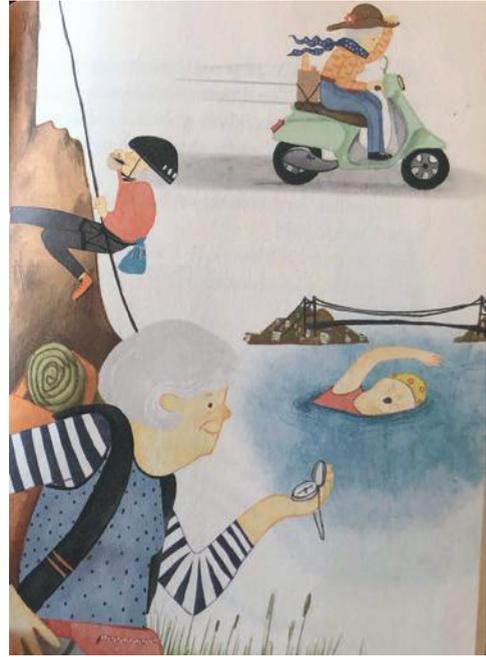
³² D. A. Klein, Council, K. J., McGuire, S. L., *Education to promote positive attitudes about aging*, «Educational Gerontology», vol. 31, 2005, pp. 591-601; World Health Organization (WHO), *Global Report on Ageism*, 2021, <<https://www.who.int/teams/social-determinants-of-health/demographic-change-and-healthy-ageing/combatting-ageism/global-report-on-ageism>> (last access: 20.05.2024).

³³ C. Avcı, G. Erhan, *Ageing versus active aging: how old age is represented in children's books*, «Educational Gerontology», vol. 48, n. 4, 2022, pp. 145-159.

what a commonality. As such, it was a weak possibility for a child to see an older adult playing an instrument (2%), practicing an extreme/outdoor sport (2%), or learning to dance (2%). There is an imbalance regarding the represented items, at least in our selection of picturebooks. Only one book [Pic. 1] depicted a grandmother engaged in extreme and outdoor sports like rock climbing, hiking, or swimming across the Bosphorus Strait, revealing that these sports potentially can be done at any age. In this manner, children or other readers will not perceive it as unusual when they encounter it in real life. These aspects of the book support the potential of taking pleasure in old age fighting against ageism³⁴.

Hence, most items create a pattern, and seeing these repeated patterns in picturebooks can narrow a child's vision of the capacities of old people. The picturebooks could present variety in terms of mapping the possible different reflections and avoid the stereotypical verbal or visual presets for depictions of old age. Additionally, if the coreader is an older adult, the child might build a stronger bond with the concept of old age, especially if that child had been exposed to a variety of examples.

In 23 books, we see old people living a fully independent lifestyle, either living by themselves or with their partners. In the rest of the books, they live with their large family. The majority of the books do not define old-age characters' specific occupations or their retirement status. In six books (13%) we see an old-age character actively working in the community. Only in one book does the character get another job after retirement, and in this book with fantasy elements, the grandmother is 240 years old and carries out research in a space laboratory at certain times of the year. She also teaches her granddaughter how to fly a space craft. We see them together piloting their individual air-



Pic. 1. *Yrtilan fotoğrafın Epey Hüzünlü Hikayesi ya da Dondurmadaki Anneanne* [The Sad Story of the Torn-Up Photo or the Grandma's Ice-Cream] by Olcay Mağden, illustrated by Ceylan Aran, Çınar Publishing, 2022

³⁴ D. Couper, F. Pratt, *Learning for a longer life, in A guide for developers of K-12 curriculum and instruction materials*, National Academy for Teaching and Learning About Aging, 1999.

crafts [Pic. 2]. The rest of the books present characters as often dealing with household tasks or gardening.

Most of the old-age characters in our selection are depicted as active and healthy, running various errands in their everyday life, and few of them are depicted as living alone. For instance, *Eda the Jealous Frog* (2015) authored by Tülin Kozikoğlu and illustrated by Sedat Girgin presents Leyla Fonten, an eighty-six-year-old woman who claims to be La Fontaine's great-granddaughter, managing on her own [Pic. 3]. In this picturebook, she not only takes care of herself in her outmoded house but ends up taking care of various pets that end up here. This book belongs to a series that tells the story of each pet



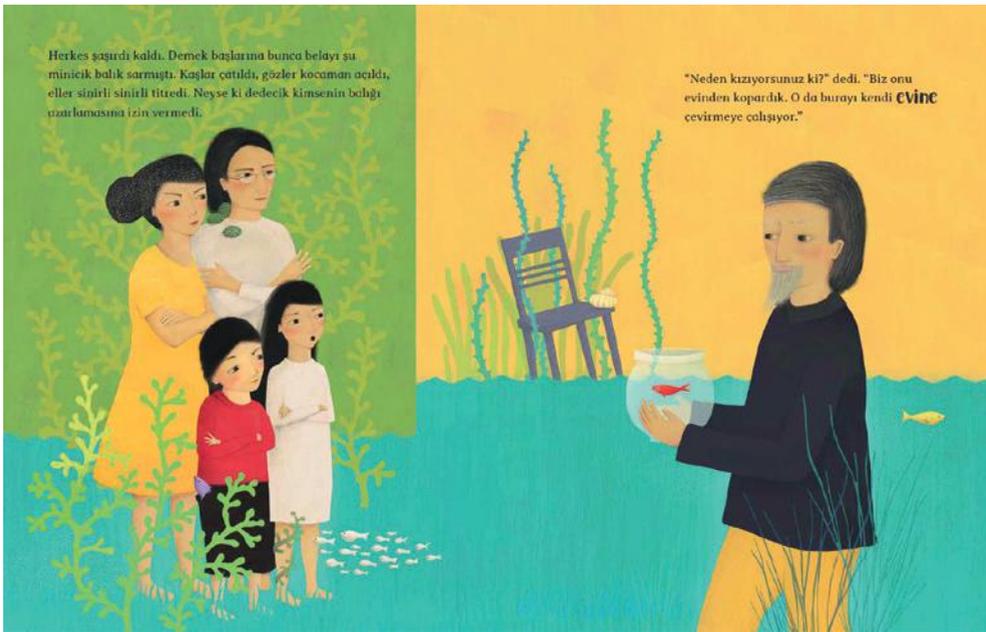
Pic. 2. *Uzaydaki Renkli Orman* [Colorful Forest in Space] by Ilgim Veryeri Alaca, Koç Publishing, 2022



Pic. 3. *Kıskanç Kurbağa Eda* [Eda the Jealous Frog] by Tülin Kozikoğlu, illustrated by Sedat Girgin, Redhouse Kidz, 2015

and their problematic character traits that Leyla Fonten witnesses and tries to manage. Here Eda is a frog who is often very jealous of others and finally realizes her own powers with the support of the old-age protagonist. Here, Leyla Fonten ends up jumping on a trampoline to show how much effort it takes for others to jump as high as Eda, an ability that the frog innately has. In that manner, the old-age character here indirectly engages in a sportive activity unexpected from her stereotypical look, creating an ironic twist to her dark clothes, gloomy house, and wrinkles. As such, this book is a good example of presenting a wise old lady sorting out a problem without being didactic, to our surprise.

In contrast to *Eda the Jealous Frog*, *The Fish in the Hat* (Şapkadaki Balık, 2018) written by Melek Özlem Sezer and illustrated by Deniz Üçbaşaran (see Pic. 4) reveals a harmonious example where the old man lives with his family. The grandfather can be considered a leading protagonist who harmoniously lives with other family members and contributes to dealing with the issues wisely that come forth. As his hat falls into the sea, the family members rush to pick it up. Thus, a red fish comes back with the hat. As the family members want to keep the fish, their everyday life is disturbed by surreal occurrences that always relate to water, sea salt, and waves, as if the fish were attempting to turn their house into the sea. At the end, the grandfather, gently carrying the fish in his hands, remarks that the fish would be better off in its natural



Pic. 4. *Şapkadaki Balık* [*The Fish in the Hat*] by Melek Özlem Sezer and illustrated by Deniz Üçbaşaran, 2018, SEV Publishing

habitat. In comparison to the brainy Leyla Fonten, the grandfather figure here is much subtler and calmer. The images and text flow not only highlight the grandfather but perhaps show him as a strong member of the family. In both of these examples, we can witness the old characters at a later stage of their lives. In order to grasp the transition to old age, books that may shed light on lifelong experiences are noteworthy, as we will mention in the next section.

A deeper understanding of old age: focus on old age and lifelong experience in picturebooks

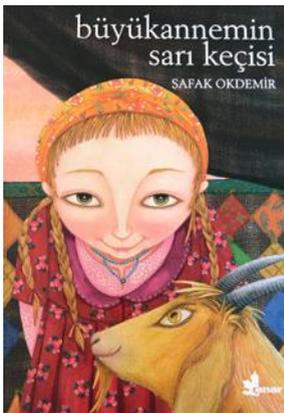
In the previous section we discussed the diversity of old-age depictions as handled in different books. Here, we discuss the importance of finding diversity within the picturebooks in terms of the depictions of old age in order to attain a profound understanding of this phenomenon. On one hand, it is favorable if the child protagonist has agency in the picturebook. On the other hand, the child reader often sees the protagonist as the main character, whereas characters from differing age groups could be mind-opening in order to grasp diverse circumstances. In our study, we selected the picturebooks according to old-age dominance, however less than half (43%) center the old-age character in the narrative. Among these books, those fully focusing on old-age characters without a child character come down to a smaller percentage (29%). This makes sense to an extent as the picturebooks target children. In that manner, the more the story capitalizes on old age, the more the picturebook has a chance to transmit information about the old-age character. In this way it becomes possible to grasp diverse aspects of old-age people through varied characters depicted in books. For instance, *Aunt Mumble* (Mıy Mıy Teyze, 2022) by Aytül Akal and illustrated by Zeynep Özatalay, presents a story with a full focus on an old-age character who lives alone and is content with that. The reader learns about her daily life in depth together with her changing moods. In many studies, being alone is frequently associated as a negative feature for older adults. However, in this book, the reader sees how she manages to spend time by herself, playing chess alone, reading books, or dining. Although she mentions getting bored of being alone, she still does not like guests or being disturbed by others at her home.

Another issue is the sharing of information regarding an old-age character's lifelong experiences. This aspect adds more value to their profound presence while allowing readers to understand them thoroughly. Some of the shortlisted picturebooks (25%) already reveal lifelong experiences of the old-age characters, shedding light on the traces of past years. Information on the old-age characters may help the reader to deal with hard topics like illness and death. As in *My Grandma's Photos* (Sunar & Urgan, 2019), the old character is de-

picted as immobile, forgetful, aloof from her family members. While these are the negative stereotypical features of old age, the story unfolds in such a way as to unearth her past experiences through memories coming to life with the aid of her photo album. We witness a metamorphosis as the grandchild starts to see the grandma empowered by her past experiences. Illustrations reveal her as a cheerful child climbing trees, a jolly traveler with a group of friends, and as a master seamstress. Even though the book presents an inevitable life course that captures some of the stereotypes about old age, it balances these with a penetrative look at her past, presenting aging as a cumulative experience. The book additionally succeeds in empowering the grandchild not only in finding innovative ways to keep communicating with the grandmother, but also as he discovers how to deal with the loss of her by making an installation at home with her photos.

A similar example could be *Büyükannemin Sarı Keçisi* (My Grandmother's Yellow Goat, 2021) by Şafak Okdemir, where the reader learns how the grandma has become a leading figure in the regional community through her past experiences [Pic. 5a-b]. While the final part of the book presents the child protagonist as a grandmother, the narrative sheds light on her masterful cooperation with the goats to find water in the mountains. In that manner, the old character's story builds up throughout the pages as we grasp the hardships she encounters together with her flock. Grappling with environmental problems enables her to attain wisdom and abilities, gain a unique ecological literacy, and help others around her.

The picturebook, *Old Man and The Mouse* (2023) by Sezin Mavioğlu and illustrated by Burak Akbay presents old age character with stereotypical physical characteristics. Visuals such as glasses, white hair, cane, with old style hat and verbal depictions on being slow and having difficulties in adjusting to a



Pic. 5a-b. *Büyükannemin Sarı Keçisi* [My Grandmother's Yellow Goat] by Şafak Okdemir, 2021, Çınar Publishing

fast-paced world present a typical picture of being old. However, in the story these stereotypical features such as slowness help him in various ways. For example, he does not miss his granddaughter's tennis match. In [Pic. 6], the text mentions that his legs are not strong enough to run away like the younger people after seeing mice coming from underground. Hence, he stays back and calmly manages to go underground after the crowd runs away and arrives at his destination on time. Besides, due to being old and mature, he doesn't panic like others and welcomes support from the mice. The whole book focuses on the old age character and let the reader witness his daily experiences and his thoughts that is a chance to understand aging in a holistic way.

Another unique example is *Granny's Chest* (Ninemin Sandığı, 2021) by Sevtap Sarıca, which presents an angry, unhappy old-age character with some gloomy personal traits [Pic. 7]. The old-age character in *Granny's Chest* is especially dark as her bad mood is consistent throughout the story. The story also presents her death, which only makes the atmosphere presented even darker. Nonetheless, the story presents a retrospective look at her whole life, as the reader learns the reasons behind her sadness and frustration. Among the selected books, 83% percent of them introduce caring and friendly old-age characters, whereas only a few books present negative personality traits. Hence, the child reader might have a tendency to expect older adults to appear cheerful and affectionate, but this doesn't reflect reality. From this perspective, we find it meaningful to come across negative traits and understand the reasons behind these emotions. In *Granny's Chest*, the protagonist frequently appears sad and upset, and imposes all sorts of rules in her own house. When we learn more about her lifelong experiences, the hardships she had gone through, we start to empathize with her moody character.

We argue that adding details from the past or sharing traces of the lived experiences of older characters enables readers to comprehend the character in depth. Hence, constructing multifaceted old-age characters through hinting what they have gone through in time, can be a strategy to understand them genuinely and thoroughly.

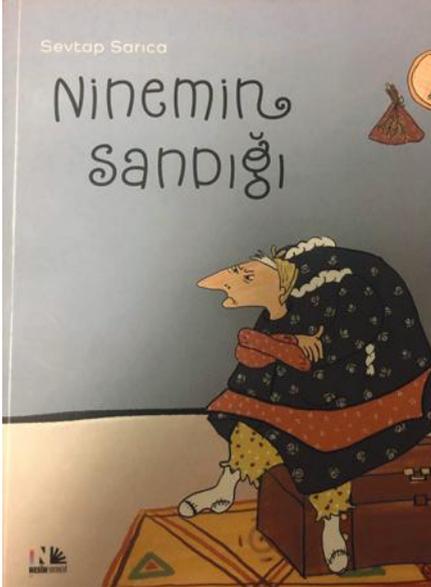
Facing the reality of death and illness

Children's literature oftentimes tends towards cheerful narratives instead of difficult subjects like death, loss, illness, or mental health³⁵. As such, these difficult topics can even be taboo or less-favored subjects, depending on the culture and era. When we look at contemporary adaptations of many fairy tales,

³⁵ N. Tucker, *Depressive stories for children*, «Children's Literature in Education», vol. 37, n. 3, 2006, pp. 199-210.



Pic. 6. *Yaşlı Adam ve Fare* [Old Man and The Mouse] by Sezin Maviöğlü, and illustrated by Burak Akbay, 2023, Doğan Çocuk Publishing



Pic. 7. *Ninemizin Sandığı* [Granny's Chest] by Sevtap Sarıca, 2021, Nesin

they often depict happily-ever-after endings, adapting the cruelty or death into subjects like forgiveness and tolerance. As such, there can be cases where no villain or hero dies but rather everyone coexists together peacefully³⁶. When we look at contemporary picturebooks, we see more of them dealing with hard topics. A comparative study of geographies where picturebooks encapsulate death or illness directly and indirectly can be studied further. In our study, seven books (15%) depicted death in the story. In four of these, the older characters were already dead and in the other two, the older characters faced serious memory issues leading to fatal ending. All of the old characters were grandparents, a common denominator of these picturebooks. In three books, the child narrator presented the death of the old character. Hence, the subject is depicted very gently and ambiguously in a way to expedite the issue. The reader does not see the character in a sickbed or in the grave but indirectly understands the loss of the character. Only in one example do we learn about a serious illness that needs to be treated at the hospital. While the old character does not die at the end, the curable disease informs the reader about a treatment process.

In our examination, forgetfulness comes across as an emerging topic (12%) in relation to old age, showing resonances to dementia. The picturebooks explaining hard subjects increase the child's awareness of the existing problems around memory loss, helping them make sense of dementia³⁷. In total, 33% of the books dealt with either a physical or mental disadvantage, illness, or death. While McGuire criticized the frequent association of older characters with death and illnesses, we did not come across these topics frequently in our selection³⁸. As discussed, this could make sense due to the reserved approach to these subjects in children's literature from Turkey. Yet, a thoughtful and reliable explanation of illness and death is helpful for a child in understanding these things as a part of life³⁹. In our sample, only 14.5% of books depicted death. This could be due to the possible challenges while dealing with hard topics that authors, illustrators or publishers try to avoid in Turkey.

Hence, managing difficult topics in children's books needs substantial effort. According to children's book author and illustrator Kitty Crowther, showing the facts and brutality in a children's story requires careful work to engage the reader and create a positive, calm attitude, free from adult influ-

³⁶ L.R. Gibson, L.M. Zaidman, *Death in children's literature: Taboo or not taboo?*, «Children's Literature Association Quarterly», vol. 16, n. 4, 1991, pp. 232-234.

³⁷ E.F. Caldwell, S. Falcus, K. Sako, *Depicting dementia: Representations of cognitive health and illness in ten picturebooks for children*, «Children's Literature in Education», vol. 52, n. 1, 2021, pp. 106-31.

³⁸ McGuire, *Growing up and growing older books for young readers*, cit., pp. 145-151.

³⁹ Gibson, Zaidman, *Death in children's literature: Taboo or not taboo?*, cit., pp. 232-234.

ences⁴⁰. Picturebooks should reflect a variety of approaches incorporating realities as well, but the tone of the book requires special attention.

Illustration Strategies: Playing with stereotypical features for diverse representations

As discussed in previous sections, depictions of old age in our sample picturebooks benefit from even more diversity. We have already tracked many of the stereotypical visual patterns such as white/gray hair, glasses/cane, and a round or hunched posture in our results. Here, we would like to discuss how books can leap from stereotypical features into diverse interpretations via illustration strategies. We see that the physical traits in action can reveal different results. In that sense, looking at how these items – like a cane – are used is critical. Similarly, a character with a stereotypical look could perform a diverse activity. For instance, in the picturebook *Here is My Great-Great Grandmother* (İşte Benim Büyük Büyükanнем, 2022) by Cansu Erkan, the old character is depicted as immobile, always sitting in her armchair a bent posture holding onto a cane. Surprisingly, the old great-grandmother uses the cane as tool to manage her tasks while seated, something which amazes the grandchild. Throughout the story, the old character actively performs various tasks that disrupt our understanding of her passive lifestyle. In short, a cane, something that is considered as a stereotypical item, in fact empowers the character.

Another example is *Mrs. Nanny* (Hanım Nine, 2022) by Sümeýra Ertürk, in which the old woman bears most of the stereotypical features of old age mentioned above. However, this old lady is content to be alone and enjoys her days cooking, reading books, exercising, gardening, and even learning how to perform ballet. She even wears a tutu on top of her dull clothes, which presents a funny yet unpredictable look. In the course of the story, she spends time with a child she does not know, as she learns from him how to do a somersault. If we evaluate the old-age character by her merely default static physical traits, this example falls under stereotypical representation. However, the author/illustrator plays with the stereotypical look and adds further facets to the character, resulting in a diverse approach. Hence, we can conclude that placing a twist on conventional perceptions can be a good strategy to achieve diversity in children's literature.

Apart from playing with stereotypical features, the way illustrators draw characters can also be a way to introduce novel, open ended approaches. For

⁴⁰ V. Antoine-Andersen, *Conversation avec Kitty Crowther*, Arles, Pyramyd, 2016.

instance, in *Colorful Forest in Space* (Veryeri Alaca, 2022), the abstracted illustrations conceal some details such as hair color and open visuals to interpretation (see Pic. 2). It can be argued that the more the illustrations are abstracted, the elder age depiction could be free from stereotypical attributions. However, we should be aware of the pros and cons of this preference. For instance, via naturalistic/realistic illustrations, the reader may connect with the characters as unique individuals rather than generic ones, fostering a sympathetic involvement with them in the narrative⁴¹. Besides, in minimalist styles, the emotional distance increases⁴². Therefore, the artist should consider these aspects depending on the context of the story.

Towards kinship in intergenerational relationships

In our study, we also explored how intergenerational relationships are depicted in selected books, examining whether such relationships are presented and, if so, how they are portrayed. Most of the books (89%) present a positive intergenerational relationship between old-age and child characters. Only one book depicts negative relationships, and three books do not mention intergenerational relationships within the verbal and visual narratives. Since we were looking for diversity, these results reveal mainly monotone depictions regarding intergenerational exchanges, which might again narrow readers' perceptions. Repeatedly seeing old-age characters playing with or caring for the children could generate generic expectations. From this point of view, having more books which could depict adverse intergenerational relationships, or a lack of intergenerational relationships could be thought provoking and informative.

When we examine the existing positive intergenerational relationships, we noted that 27% + 6% of the books were based on one-way communication, i.e. one side is the active giver while the other side is the passive taker. In 27% of the books, we see older characters depicted as teaching or telling a story to a child character. In 6% of the books the child character is depicted as helping the old-age character. When we look at reciprocal intergenerational relationships, 8% of the books present a two-way exchange. Among these books, one book solely depicts a reciprocal relationship, whereas the other three also have mutual shared-time activities. In this type of relationship, a child can teach or support the older character and viceversa. Activities carried out together (50% of the books) seemed to be the most enjoyable that old and child character play, dance, make or care for animals together. The fact that the great majority

⁴¹ C. Painter, L. Unsworth, J.R. Martin, *Reading Visual Narratives: Image Analysis in Children's Picture Books*, Sheffield, Equinox Publishing, 2013.

⁴² *Ibid.*

of picturebooks depict mutual shared relationships, is a good sign and supports kinship between children and adults rather than poor communication or indifference⁴³. Both parties can enjoy the time and be involved as an active contributor. However, from the perspective of embracing variety, there could be more books presenting one-way or reciprocal relationships as a factual reflection of real life.

A practical guiding chart for diverse representations of old age

In the previous sections, we examined literature and discussed our results regarding diverse representations of old age in picturebooks. In this section, we turn our reflections into a table that may inspire picturebook makers. Our table presents ways to promote pluralistic representations of old age and thereby support child and adult readers to have a broadminded perspective about aging and old age at large. In children's literature, positive attitudes towards aging that come with varied depictions of old age are increasingly promoted. McGuire's (2003) literature-analysis form⁴⁴, promoted book lists, or the AGHE award all aim to increase awareness of the importance of inter-generational exchanges, enriched with valued old-age characters in children's books⁴⁵. Differently from McGuire's approach, we aim to advocate diversity in multiple directions, portraying not only positive and idealized representations but also depictions that mirror the various realities of aging. Our approach is more holistic and intends to enhance readers' understanding of the sundry aspects associated with getting old. Actually, in our analysis we found certain authors having more than one book on our sample list. In seeking varied representations of old age, we first thought to delist other books by the same author/illustrator, but then we noted that each representation regarding old age was totally different. For example, Mavisel Yener wrote three picturebooks (two of them together with Aytül Akal) and in each of them, old age was depicted differently. In *Where is My Ball* (Topum Nerede, 2021) the old-age character is an athletic grandma depicted with blue hair and playing tennis with her grandson. In *Flying Dad* (Uçan Dede, 2020) written by Aytül Akal and Mavisel Yener, despite the old-age character's stereotypical features such

⁴³ M. Gubar, *The Hermeneutics of Recuperation: What a kinship-model approach to children's agency could do for children's literature and childhood Studies*, Jeunesse, Young People, Texts, Cultures 8, Project Muse, 2016, pp. 291-310.

⁴⁴ McGuire, *Growing up and growing older books for young readers*, cit., pp. 145-151.

⁴⁵ In 2009, the Association for Gerontology in Higher Education (AGHE) launched the AGHE Book Award for Best Children's Literature on Aging to motivate and trigger awareness of authors and publishers on how aging and older adults are represented and promote those books which convey a positive, diverse, and meaningful portrayal of aging.

as white hair, baldness, or wrinkles, he is an independent old man dressed in modern clothes looking for things to do and helping people around the city. In *Flying Nanny* (Uçan Nine, 2016) written by Aytül Akal and Mavisel Yener, the old-age character is an independent old woman in a farm dressed in traditional clothes. She is playing with children and possesses most of the stereotypical features of old age. As such, these variations and our analysis of different books inspired us to generate the following chart to list the myriad possibilities regarding depictions of old age in picturebooks.

Focus of the story	old-age character - focalisation: first person or third person <input type="checkbox"/>	old-age character - focalisation: the child's perspective <input type="checkbox"/>	intergenerational relationship (old-age person & child) - focalisation: multiple <input type="checkbox"/>
Role	grandparent <input type="checkbox"/>	parent <input type="checkbox"/>	individuals- not parent or grandparent <input type="checkbox"/>
Environment	home <input type="checkbox"/>	outdoor- garden/ park <input type="checkbox"/>	different location (circus, Olympics, factory, etc.) <input type="checkbox"/>
Status	working <input type="checkbox"/>	retired <input type="checkbox"/>	no mention or not working <input type="checkbox"/>
Personal Traits	happy, loving, caring, friendly, humorous, funny <input type="checkbox"/>	angry, lonely, sad -presented with reasoning, or transformative change <input type="checkbox"/>	transform in traits, negative to positive (ex: angry to happy) or hybrid <input type="checkbox"/>
Activities	mundane activities <input type="checkbox"/>	different activities (extreme sports, ski jumping, etc.) <input type="checkbox"/>	passive <input type="checkbox"/>
Intergenerational Relationship	positive: one way, reciprocal, mutual <input type="checkbox"/>	no mention <input type="checkbox"/>	negative -share reasoning or transformative capacity <input type="checkbox"/>
Lifelong experiences	whole life – aging process <input type="checkbox"/>	part of life <input type="checkbox"/>	details from the past <input type="checkbox"/>
Illness & Death	mild illness <input type="checkbox"/>	serious illness, in the process of dying <input type="checkbox"/>	death <input type="checkbox"/>
Illustration	stereotypical (white/grey hair, wrinkles or sagging of skin, balding, use a physical aid, use of glasses, not fit, hunched over...) <input type="checkbox"/>	not stereotypical (different hair colors, modern/sportive outfits/ traditional clothes, fit...) <input type="checkbox"/>	twisting stereotypical features: merge with unexpected feature or abstract drawing <input type="checkbox"/>

Tab. 6. Towards multifaceted, plural portrayal: A guiding chart – check list for picturebook makers, children's libraries

This chart points out the basics of varied depictions of old age extracted from our findings based on our selected picturebooks. It may be helpful to

check how different picturebooks align with some of these dynamics that we have pointed out and can potentially be utilized by interested parties such as picturebook makers or libraries regarding old age depiction to extend variety and embrace diversity. For instance, children's libraries can evaluate their book collections using this checklist to assess the diversity of old age representations. Based on this assessment, they can expand their collections to provide a broader range of examples for young readers. Or picturebook makers can consider varied options when they work on constructing characters.

Conclusion

In this study, we examined depictions of old age in contemporary picturebooks from Turkey and pointed out the importance of diverse representations through our selection. We observed similar patterns for depictions of old age in the form of caring grandparents, mainly in mundane settings such as their home or garden. Oftentimes, their occupation or working status was not revealed but they were portrayed as storytellers, cooks, or playmates, i.e. stereotypical features associated with old age. Yet, the overall results present a positive attitude towards old age when we compare these picturebooks to older publications in which negative stereotypes were mentioned in many studies. However, in this study our main point that we want to highlight is embracing both negative and positive personal traits as long as these do not become repetitive to shape perceptions in one direction. Positive repetitive representations could also lead ageism and create expectations. Longer life spans and declining birthrates have led to significant demographic changes, resulting in older adults making up a growing share of the population in many regions around the globe. And this is not a homogenous group, in contrast very diverse due to varied life long experiences.

As Bishop (1990) states, books should act like mirrors reflecting varied realities in life in which readers may find their own reflections, possibly their future selves⁴⁶. As we envision it, embracing and empathizing with the realities of old people living around the world in picturebooks could empower inter-generational relationships and raise overall well-being in society. Children can thereby learn that aging doesn't have to mean a decline but can be a time of growth and fulfillment in varied ways. This can motivate children to be part of age-friendly and age-inclusive societies when they become decision-makers⁴⁷.

Our study champions a plurality of depictions which cover the multifac-

⁴⁶ Bishop, *Mirrors, windows, and sliding glass doors*, cit., pp. 9-11.

⁴⁷ McGuire, *Counteracting ageism: Promoting accurate concepts about aging in young children*, cit.

eted features of old age in order to avoid stereotypes. It can be misleading to consider the range of ages as a system set in stone as people – despite their age – may present similar characteristics. Hence, based on the insights gained through analysis and literature, we proposed a guiding chart in a checklist form to be considered in the production and selection of picturebooks to promote diversity in children’s literature. In the chart we also share strategies for creating profound old-age characters via embedding lifelong experiences – for a deeper understanding or putting a unique twist on stereotypical features. The chart aims to increase awareness regarding plurality and multifaceted nature of older adults. As such children may embrace diversity of depictions in older adults granting affirmative intergenerational relationships.

Il risparmio come strumento educativo e propagandistico nell'Italia dell'autarchia

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The saving as an educational and propaganda tool in Italy of autarchy

ABSTRACT: The League of Nations launched a series of economic sanctions against Italy, following the invasion of Ethiopia in 1935. This decision, leading to the country's isolation from international trade and preventing the supply of raw materials that were indispensable for the continuation of the war effort, led to the start of an autarkic policy, aimed at achieving economic self-sufficiency, which the fascist regime managed to turn into a highly successful propaganda moment, which also involved childhood. This research aims to investigate the educational and propagandistic aspects of saving during the period, by analyzing childhood involvement, through a wide range of sources within this process.

EET/TEE KEYWORDS: Education; Saving; Autarchy; School; Children's literature; XX Century.

Il 18 novembre 1935 entravano in vigore le sanzioni varate dalla Società delle Nazioni nei confronti dell'Italia fascista, a seguito dell'invasione che, il 3 ottobre dello stesso anno, questa aveva compiuto nei confronti dell'Impero etiope¹, violando di fatto l'articolo 12 dello statuto dell'organizzazione, che

¹ Sulla guerra e sul dominio italiano in Etiopia si veda A. Del Boca, *Gli italiani in Africa Orientale*, Roma-Bari, Laterza, 1979; A. Sbacchi, *Il colonialismo italiano in Etiopia 1936-1940*, Milano, Mursia, 1980; R. De Felice, *Mussolini il duce: Gli anni del consenso 1929-1936*, Torino, Einaudi, 1996 (2^a ed.); N. Labanca, *Oltremare: storia dell'espansione coloniale italiana*, Bologna, il Mulino, 2002; L.E. Longo, *La campagna italo-etiopea, 1935-1936*, Roma, Ufficio storico SME, 2005; G. Rochat, *Le guerre italiane (1935-1943). Dall'impero d'Etiopia alla disfatta*, Torino, Einaudi, 2005; N. Labanca, *Una guerra per l'impero. Memorie della campagna d'Etiopia 1935-36*, Bologna, il Mulino, 2005; Id., *La guerra d'Etiopia 1935-1941*, Bologna, il Mulino, 2015; V. Righettoni, *Bianco su nero. Iconografia della razza e guerra d'Etiopia*, Macerata, Quodlibet, 2018; L. Acquarelli, *Il fascismo e l'immagine dell'impero. Retoriche e culture visuali*, Roma, Donzelli, 2022. Per una ricerca storiografica sul tema, B.M. Carcangiu, T. Negash, *L'Africa orientale italiana e il dibattito storico contemporaneo*, Roma, Carocci, 2007.

demandava alla stessa la risoluzione delle controversie tra i vari Stati. Tale atto, tuttavia, finì per rafforzare il consenso nei confronti del regime che uscì da questo complesso periodo estremamente rafforzato.

L'azione della Società delle Nazioni, fortemente condizionata dal giudizio inglese e francese, offrì, infatti, al regime la possibilità di presentare la guerra in Etiopia come guerra di popolo, e le sanzioni come un atto di deliberata crudeltà da parte di paesi ricchi e opulenti nei confronti di un popolo umile e bisognoso di nuove terre, come quello italiano. Un conflitto che, come riporta Montino, il fascismo riuscì a presentare come guerra di popolo, «la guerra dei proletari e dei poveri (riecheggia qui l'Italia 'grande proletaria' del mondo di pascoliana memoria) che possono sfogare così le loro tensioni ed illudersi di avere una nuova frontiera da conquistare»².

Al periodo delle sanzioni, che rimasero in vigore fino al 14 luglio 1936, furono, inoltre, legate una serie di iniziative che, coinvolgendo attivamente le masse popolari, puntavano ad un duplice scopo: ottemperare alla mancanza di materie prime, il cui approvvigionamento, essenziale per il proseguimento delle vicende belliche, era reso impossibile dalla mancanza di importazioni, e, soprattutto, coinvolgere il popolo italiano all'interno di quella che veniva presentata come una grande impresa collettiva, in cui un paese, 'solo contro tutti' e ingiustamente emarginato da un consesso internazionale formato da potenze realmente colonizzatrici, come Inghilterra e Francia, riusciva a resistere e a trionfare con le sue proprie forze. Si tratta, ovviamente, della politica autarchica³ auspicata e voluta da Mussolini, che, dietro al raggiungimento dell'autosufficienza economica e del perseguimento delle azioni militari, mirava ad un altro tipo di vittoria, da raccogliersi non sul campo di battaglia, ma, per quanto risulti paradossale, sotto il profilo etico. A questo scopo – rispetto al quale il fascismo riuscì ad ottenere discreti risultati – vanno ricondotte grandi iniziative di regime, come la raccolta del ferro e dell'oro⁴, metalli essenziali per l'industria e l'economia italiana, e la campagna contro gli sprechi. Agli occhi

² D. Montino, *Libro, quaderno e moschetto: pedagogia della guerra nelle letture e nelle scritture scolastiche durante il regime fascista*, «History of Education and Children's Literature», vol. II, n. 2, 2007, pp. 206-207.

³ Sui rapporti fra Italia e Società delle Nazioni e sulla politica autarchica, F. D'Amoja, *La politica estera dell'impero. Storia della politica estera fascista dalla conquista dell'Etiopia all'Anschluss*, Padova, CEDAM, 1961; G. Toniolo, *L'economia dell'Italia fascista*, Roma-Bari, Laterza, 1980; A. Gagliardi, *Il ministero per gli Scambi e valute e la politica autarchica del fascismo*, «Studi storici», n. 4, ottobre-dicembre 2005, pp. 1033-1071; R. Gualtieri, *Da Londra a Berlino. Le relazioni economiche internazionali dell'Italia, l'autarchia e il Patto d'acciaio (1933-1940)*, «Studi storici», n. 3, luglio-settembre 2005, pp. 625-659; E. Di Rienzo, *Il gioco degli Imperi. La guerra d'Etiopia e le origini del secondo conflitto mondiale*, Roma, Società editrice Dante Alighieri, 2016; E. Di Nolfo, *Storia delle relazioni internazionali. Dal 1918 ai giorni nostri*, Roma-Bari, Laterza, 2018, cap. 3.

⁴ P. Terhoeven, *Oro alla patria. Donne, guerra e propaganda nella giornata della Fede fascista*, Bologna, il Mulino, 2006.

del governo, tali azioni, celebrate con trionfali eventi collettivi e dal forte impatto emotivo, dovevano essere la rappresentazione dello sforzo di un intero popolo in armi, pronto ai sacrifici e alle privazioni che la patria chiedeva, laddove, in Etiopia, i soldati erano pronti a morire per la vittoria finale.

Nella prefazione al testo *Economia fascista. Sanzioni, commercio estero, autarchia* di Raffaello Riccardi, pubblicato nel 1939, Galeazzo Ciano, ragionando sul periodo da poco trascorso, esaltava la vittoria, sul piano economico e “morale”, dell'Italia sulle altre nazioni. Una visione che, seppur inquinata pesantemente dalla propaganda, non può che essere considerata in parte vera da un punto di vista squisitamente politico.

Dalle sanzioni il commercio internazionale non ebbe che danni – ch e le sanzioni interrompero quel movimento di ripresa nei traffici che si era delineato nel 1935 – e l'Italia ne trasse, nella sua dura resistenza, le forze vitali di adattamento e di rinnovamento che hanno permesso di impostare l'economia del Paese su quelle basi di indipendenza, necessarie alla libert  internazionale dell'Italia. N  questo sarebbe stato possibile senza quelle virt  di disciplina e di audacia, di operosit  e di ordine, che il Duce ha profondamente impresso nel carattere del popolo italiano, dal quale sono scaturite le energie costruttrici della sua vita economica⁵.

1. *I bambini e lo sforzo collettivo*

Da questo intenso processo propagandistico non rimase di certo esclusa l'infanzia che, attraverso un indottrinamento riconducibile tanto alla sfera pubblica del bambino, sia scolastica che extrascolastica⁶, che a quella privata e del tempo

⁵ G. Ciano, *Prefazione*, in R. Riccardi, *Economia fascista. Sanzioni, commercio estero, autarchia*, Roma, Unione editoriale d'Italia, 1939, pp. 12-13.

⁶ Basti pensare a iniziative come il racconto svolto in classe delle operazioni militari e dell'avanzamento italiano in Etiopia e alle frequenti manifestazioni dell'Opera Nazionale Balilla (O.N.B.). Rispetto all'ambito scolastico, Mariella Colini riporta che, «Durante i sette mesi della campagna d'Etiopia, la prima occupazione degli scolari, non appena entrati in classe, consistette nello scrivere sotto dettatura il notiziario quotidiano delle operazioni militari; in seguito un allievo si avvicinava alla carta geografica dell'Africa appesa al muro, e spostava le bandierine che segnalavano l'avanzata delle truppe e le localit  prese dagli italiani», M. Colin, *I bambini di Mussolini. Letteratura, libri, letture per l'infanzia sotto il fascismo*, Brescia, La Scuola, 2012, p. 326. Sul coinvolgimento dell'infanzia durante la guerra in Etiopia si vedano anche A. Scotto Di Luzio, *L'appropriazione imperfetta. Editori, biblioteche e libri per ragazzi durante il fascismo*, Bologna, il Mulino, 1996; A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Sal *, Torino, Einaudi, 2005; J. Meda, *La politica quotidiana. L'utilizzo propagandistico del diario scolastico nella scuola fascista*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 1000-1027; L. Ricci, *La lingua dell'Impero. Comunicazione, letteratura e propaganda nell'et  del colonialismo italiano*, Roma, Carocci, 2005; J. Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016; M. Galfr , *Tutti a scuola! L'istruzione nell'Italia del Novecento*, Roma, Carocci, 2017.

libero, fu soggetta ad un costante e continuo coinvolgimento. Il racconto delle «inique sanzioni», espressione molto usata se non addirittura abusata nel periodo di riferimento, si manifestava in opere di vario genere, come libri, filmati, canzoni e giornalini, che avevano come argomento non solo quello della guerra e delle avventure nelle colonie, ma anche il risparmio e la parsimonia, fondamentali per sostenere lo sforzo bellico in un momento estremamente complesso⁷.

Proprio nel 1936, ad esempio, Mario Giusti e Ernesto Ambrosi diedero alle stampe, per la Belforte & C. di Livorno, *I racconti del salvadanaro*, che fin dal titolo e dalla copertina rende ben noto ai lettori le tematiche trattate. In questa, infatti, illustrata da Bruno Caluri, salta subito all'occhio un soldato dall'aspetto fiero e sprezzante; ai suoi piedi, dietro il titolo dell'opera, si può intravedere un salvadanaio. Il testo, che ebbe un discreto successo e diverse ristampe, si presenta come una raccolta di novelle che, in pieno periodo autarchico, avevano lo scopo di illustrare ai bambini i vantaggi del risparmio, motore della vita nazionale e chiaro esempio delle italiche virtù. Nella prefazione, l'autore insiste sullo spirito nazionale e militarista che, in economia come in guerra, deve concretizzarsi nell'abnegazione e nel sacrificio dei cittadini. L'oro, infatti, diventa nel testo «il sangue delle Nazioni» e, di conseguenza, una lira risparmiata altro non è che «una stilla di vivo e rosso sangue nel corpo bello della gran Madre immortale» e dunque un altro modo per servire l'Italia:

PREFAZIONE

O balilla, o avanguardista, o giovane fascista: fiori magnifici della grande Italia Imperiale! Noi sappiamo che ognuno di voi sarebbe pronto, domani, ad offrire la vita in olocausto all'altare della Patria...

[...] Sì: l'oro è il sangue delle Nazioni e colui che non sa essere sobrio, economo, risparmiatore, non è buon Italiano buon combattente.

Dunque, o giovine lettore, tu che studi e lavori con coscienza fascista, e poi, nei giorni di festa addestri il giovane corpo negli stadii, nelle palestre e negli agoni che il Duce magnifico, Padre della Patria, creò per te, ricordati di essere sempre probo ed economo. Aggiungendo questa virtù del Risparmio alle altre che già t'imponesti, sarai perfetto, come deve esserlo un giovane cresciuto nella cima ardente del Littorio: perfetto, cioè, come i giovani legionari che combattevano sotto i labari di Giulio Cesare, ai tempi dell'altro Impero. Una lira da te risparmiata sarà una stilla di vivo e rosso sangue nel corpo bello della gran Madre immortale⁸.

⁷ Sulle possibilità offerte dai nuovi media e, in particolare, dalla diffusione della radio nel panorama educativo fascista, si rimanda a questo passo di Galfré: «L'autorità si manifesta anche nei racconti e nelle riflessioni sulla radio presenti nei quaderni, attraverso cui il fascismo a partire dagli anni Trenta giunge direttamente non solo dentro la scuola, ma ovunque, anche nelle campagne, dando quindi prova di una capacità di penetrazione inedita», Galfré, *Tutti a scuola!*, cit., p. 101. Si vedano, inoltre, G. Isola, *L'ha scritto la radio storia e testi della radio durante il fascismo (1924-1944)*, Milano, Mondadori, 1998; F. Girolmoni, «I ragazzi che ascoltavano la radio». *Una generazione tra fascismo, Resistenza e scelta repubblicana, 1922-1946*, Perugia, Morlacchi, 2023.

⁸ M. Giusti, E. Ambrosi, *I racconti del salvadanaro*, Livorno, Belforte & C., 1937, p. 6, Acs, Pcm, Uplas. a 176.

La prima storia del libro è quella del nano Sparagnino. Il narratore racconta la vicenda di un suo sedicente amico, ufficiale di marina, che da bambino, influenzato dalle favole narrate dal vecchio nonno garibaldino, cominciò a prestare parte delle sue paghette al nano Sparagnino, un povero gnomo, che sopravviveva grazie ai prestiti dei suoi piccoli finanziatori. Ma il nano Sparagnino, raccontava il nonno, «non è un ingrato; prende i soldi solamente in prestito, e a coloro che lo hanno aiutato per un certo tempo, egli, un bel giorno fa un generoso regalo»⁹. Il bambino, ormai diventato grande e pur non credendo più alla favola raccontata da nonno, continuava a elargire prestiti al nano, ogni volta che l'anziano lo informava sulle sue disastrose condizioni economiche: «continuavo a fingere di crederci per far contento il nonno, che noi tutti, in casa, consideravamo il genio tutelare della famiglia»¹⁰. Una volta conseguita la maturità, durante un pranzo per festeggiare il lieto evento, il protagonista confessa alla famiglia il suo desiderio di entrare nell'Accademia Navale per diventare ufficiale di Marina. I volti dei familiari, però, si adombrano: a preoccuparli non è la scelta del ragazzo, che anzi ammirano, ma gli alti costi dell'istituto. È in quel momento che l'intero racconto arriva alla sua morale, nonché alla lieta conclusione.

– Un momento! – interruppe allora il nonno, drizzandosi sulla sua poltrona con brio giovanile. – In nini andrà all'Accademia, ed alle spese penserà il nano Sparagnino. Non credete? Aspettate un po', allora...

Uscì col suo passo caratteristico, un po' strascicato, ed andò in camera sua, lasciandoci a guardarci in volto...quasi dubbiosi che al vecchietto la troppa gioia avesse turbato le funzioni cerebrali.

Invece il nonno tornò con un libretto della «Cassa di Risparmi» fra le mani tremanti.

– Ecco! – gridò, agitando il libretto sopra la testa – questi sono i prestiti fatti al nano Sparagnino dal nostro caro licenziando, durante dodici anni. Mille lirette, fra capitale ed interessi maturati...Poiché (te lo dissi altra volta, nini) i soldini dati in prestito allo gnomerottolo benefico sono come il chicco di grano che tu pianti nella terra generosa; dopo sei o sette mesi tu torni, ed al posto del granello c'è una spiga che si piega sotto il peso dei chicchi! Con le mille lire, nini, tu entrerai nella bella Scuola marinara, che è onore e vanto della nostra Livorno; e per continuare ci sarà un altro libretto. *Il mio*¹¹.

La storia, nella quale non mancano tematiche care al fascismo, come il culto del militarismo e dell'avventura, ben rappresentato dalla scelta del protagonista di voler far parte della Marina, o quello della ruralità, esaltato dalla similitudine fra i soldi depositati e accresciuti nel tempo e il chicco di grano che, una volta piantato, darà un girone una rigogliosa spiga, ha come scopo ideale quello di esaltare le Casse di Risparmio in quanto organizzazioni 'amiche' e benefattrici dei più poveri. L'argomento, del resto, non era privo di

⁹ *Ibid.*, p. 8.

¹⁰ *Ibid.*, p. 10.

¹¹ *Ibid.*, pp. 13-14.

fondamento. Sviluppatisi prima in altri paesi e solo a partire dal 1822 in Italia¹², questi istituti nacquero, infatti, con lo scopo di incoraggiare il risparmio delle classi più basse, promuovendo il valore della previdenza e dell'accumulo di denaro come strumento per lo sviluppo dell'economia. Ciò garantì alle Casse di Risparmio la piena fiducia da parte delle classi popolari, tanto che nei momenti di crisi economica, invece di incrinarsi, come spesso accadeva per gli altri istituti creditizi, il loro prestigio andava aumentando¹³. Anche il rapporto fra le Casse e il mondo della letteratura non era del tutto nuovo; basti pensare che, già nel 1837, Enrico Mayer aveva pubblicato a Firenze *Il Salvadanaro. Sei racconti popolari, preceduti da un Dialogo sulla Cassa di Risparmio dell'Ab. R. Lambruschini*¹⁴, un testo che, a partire dal titolo, potrebbe aver ispirato quello pubblicato cento anni dopo. Lo stesso Mayer, per altro, in una sorta di prefazione per i «Depositanti», informava che quelle pagine erano state «intitolate il Salvadanaro, perché in esso ritrovo la primitiva immagine della Cassa di risparmio, immagine che fino dall'infanzia si rende familiare a ogni più povera persona, e che, parlando col popolo, mi ha tenuto luogo di molti ragionamenti»¹⁵.

Probabilmente, però, dietro l'esaltazione delle Casse c'è anche un'altra motivazione, questa volta di carattere strettamente politico. A seguito della crisi economica del 1929, dalla quale il paese non era mai totalmente uscito, e delle sanzioni della Società delle Nazioni, Mussolini, convinto che una politica estera indipendente non potesse prescindere dall'autosufficienza economica, aveva spinto verso un processo di centralizzazione, che avocasse allo Stato enti considerati strategici (come l'IRI, diventato ente di carattere permanente nel 1937, al fine di garantire il controllo su vari settori economici). Si tratta, ovviamente, di un indirizzo economico volto a favorire politiche di stampo autarchico, che non potevano prescindere da un controllo più diretto sugli istituti bancari. Ciò fu reso possibile dal regio decreto del 12 marzo 1936 n. 375 che, riporta da De Rosa, si presentava come «un complesso di provvedimenti che [...] unificarono la funzione di controllo su tutti gli istituti raccoglitori di risparmio e disciplinarono diversamente la distribuzione funzionale e territoriale degli

¹² In questa data nasce, infatti, la Cassa di Risparmio di Venezia, prima in Italia. Sulle Casse di Risparmio si veda H.P. Turn, E. Liguori, V. Marrani, *La storia del risparmio e delle casse di risparmio italiane*, Linate (MI), Vallardi, 1991, L. De Rosa, *Storia delle Casse di Risparmio e della loro Associazione 1822-1950*, Roma-Bari, Laterza, 2003.

¹³ «La storia delle Casse di Risparmio si confonde, in effetti, con le vicende economiche e politiche del Paese in un reciproco rapporto di casualità; ed è assai rilevante il fatto che, nelle grandi crisi economiche cicliche, la congiuntura negativa, in luogo di prostrarle, contribuiva, per la fiducia di cui erano circondate, a irrobustirle, facendo affluire ai loro sportelli il risparmio depositato presso altri tipi di banche», De Rosa, *Storia delle Casse di Risparmio*, cit., *Prefazione*.

¹⁴ E. Mayer, *Il Salvadanaro. Sei racconti popolari, preceduti da un Dialogo sulla Cassa di Risparmio*, dell'Ab. R. Lambruschini, Gabinetto Scientifico-Letterario di G.P. Vissieux Firenze, 1837.

¹⁵ *Ibid.*, *Ai depositanti delle Casse di Risparmio*.

organi di credito»¹⁶. La legge, che naturalmente coinvolgeva anche le Casse di Risparmio, già inserite nel 1934 nella Corporazione della previdenza e del credito, fu aspramente criticata da questi istituti, che vedevano la loro autonomia fortemente limitata dal provvedimento. Per uscire da questa situazione che, considerando il legame esistente fra le Casse di Risparmio e le classi popolari, rischiava di diventare estremamente complessa, il regime cercò di rinsaldare il proprio legame con questi istituti di credito. Emblematica risulta, infatti, la rassicurazione che lo stesso Mussolini diede già alla vigilia degli stravolgimenti bellici, nel 1935, a Giuseppe De Capitani D'Arzago, presidente dell'Associazione casse di risparmio italiane: «Sta tranquillo e dì ai tuoi colleghi che lo siano pure. Alle Casse sta di sentinella Benito Mussolini»¹⁷. La tematica del risparmio e dell'importanza degli istituti ad esso preposti, presente, senza dubbio, anche prima del periodo autarchico, svolse, a partire da esso, un compito educativo molto importante, i cui influssi si riscontrano anche nel mondo scolastico. A testimonianza di ciò, è utile citare il testo, pensato proprio per gli insegnanti che, fin dal 1930, la Cassa di Risparmio delle province lombarde inviò come omaggio nelle scuole¹⁸: *Il risparmio come insegnamento nel corso elementare e nel corso di avviamento professionale*.

In una lettera del 24 aprile 1935, quando i venti di guerra con l'Etiopia cominciavano già a soffiare, indirizzata a Giuseppe De Capitani D'Arzago e inserita nel testo, il regio provveditore agli studi Umberto Renda scriveva che,

Il desiderio di risparmiare, già insito nel carattere delle nostre popolazioni, deve trovare fondamento e incoraggiamento nella educazione della scuola. Dobbiamo rivolgere ogni nostro sforzo per raggiungere lo scopo propostoci, cioè far sì che ogni alunno diventi possessore di un libretto di risparmio. Nessuna preoccupazione per l'entità della somma iscritta; meglio anzi se sarà limitatissima. Ma l'alunno deve avere il compiacimento di essere un risparmiatore anche per cifre modestissime, deve gustare la gioia di possedere un suo libretto di risparmio, che gli dà l'orgoglio di sentirsi già uomo¹⁹.

Tale missione educativa si riflette chiaramente sui banchi scolastici. È quan-

¹⁶ De Rosa, *Storia delle Casse di Risparmio*, cit., p. 307. Sul tema, che rimanda in generale alla costituzione effettiva del sistema corporativo, si rimanda a R. Faucci, *Appunti sulle istituzioni economiche del tardo fascismo, 1935-1943*, «Quaderni storici», vol. 10, n. 29-30, maggio-dicembre 1975, pp. 607-630; V. Santoro, *Separazione di gestioni tra credito a breve e lungo termine. Profili storici della formazione del «principio»*, in M. Porzio (ed.), *La legge bancaria. Note e documenti sulla sua «storia segreta»*, Bologna, il Mulino, 1981; G.F. Calabresi, *L'Associazione bancaria italiana. Un caso di associazionismo economico*, Vol. 1, 1919-1943, Roma-Bari, Laterza, 1997; A. Gagliardi, *Il corporativismo fascista*, Roma-Bari, Laterza, 2014, cap. 4.

¹⁷ De Rosa, *Storia delle Casse di Risparmio*, cit., p. 36.

¹⁸ È ciò che emerge dalla lettera, inserita nel testo, scritta dal provveditore agli studi della Lombardia Truffi a De Capitani D'Arzago il 22 agosto 1930, in C.L. Guelfi, *Il risparmio come insegnamento nel corso elementare e nel corso di avviamento professionale*, 2^a ed., Milano, Cassa di risparmio delle province lombarde, 1935.

¹⁹ Guelfi, *Il risparmio come insegnamento*, cit.

to emerge dall'esame dei diari e dei quaderni, come ad esempio il testo che, il 31 agosto 1935, viene dettato a Emilio, un bambino di seconda elementare di una scuola di Genova:

La vera ricchezza dei popoli è nella previdenza e nel Risparmio.

Le Casse di Risparmio sono la provvidenza degli operai.

Sono il soccorso nelle loro disgrazie; l'asilo della loro vecchiaia.

Un libretto della Cassa di Risparmio è il passaporto al lavoro e al risparmio²⁰.

La politica previdenziale fascista, a cui molte delle pagine dei quaderni fanno riferimento, si basava, del resto, più su un uso propagandistico degli strumenti assistenziali, come l'Istituto nazionale fascista di previdenza sociale (prima di allora Cassa Nazionale per le Assicurazioni Sociali), che su una reale attenzione al welfare state, che anzi si presentava come frammentario e discrezionale, privilegiando, ad esempio, più le categorie professionali urbane – quella piccola e media borghesia che era stata il fulcro iniziale del potere mussoliniano – che i lavoratori agricoli²¹. Il 23 novembre 1935 (dunque pochi giorni dopo l'entrata in vigore delle sanzioni) Anna, bambina della stessa scuola genovese incontrata precedentemente, riportava quanto dettato dall'insegnate:

Mia cara bambina, abitua la tua mano a non sciupare il soldino, e quanto ti è necessario nella vita.

Vedi? Anche gli animali risparmiano, e l'umile formica può esserti maestra.

Con le tue economie potrai comprare cose utili e più ancora potrai pensare al tuo domani, acquistando una polizza di Assicurazione Popolare. Prega tuo Padre di farti questo dono, e un giorno benedirai il piccolo sacrificio e il consiglio della tua Maestra²².

Il grande successo ottenuto da *I racconti del salvadanaro* fece sì che la casa editrice Tirrenia pubblicasse, appena tre anni dopo, un altro libro molto simile. Si tratta de *La prima sorgente*, anch'esso scritto da Ernesto Ambrosi e Mario Giusti²³. Lo scopo del volumetto, come riportato dagli autori, era lo stesso del precedente:

preparare nei bimbi di Mussolini una coscienza eroica, patriottica, autarchica, mettendo in evidenza le virtù di nostra gente ed esaltando i benefici di quel 'Risparmio' che, come il duce ha detto, è la prima sorgente di ogni benessere della Nazione. Solo, questa volta abbiamo voluto accontentare anche i più piccini, i cari 'Figli della Lupa', gli alunni della

²⁰ MuSEd, ADLR, Quaderni, 153.03. *Sanzioni e controsanzioni*.

²¹ C. Giorgi, *Le politiche sociali del fascismo*, «Studi storici», n. 1, 2014, pp. 96-97. Si veda anche S. Vinci, *Il fascismo e la previdenza sociale*, «Annali della facoltà di Giurisprudenza di Taranto», vol. III, 2011, pp. 709-729.

²² MuSEd, ADLR, Quaderni, 153.03. *Sanzioni e controsanzioni*.

²³ E Ambrosi, M. Giusti, *La prima sorgente*, Livorno, Società Editrice Tirrena, 1939, Acs, Pcm, Uplas. a. 403.

2^a e 3^a classe, mettendo nella nuova opera tante cosettine argute ed accessibili alle loro fresche anime²⁴.

Il testo che, come informa la prefazione, è indirizzato a bambini decisamente più piccoli, si presenta come una raccolta in cui, ai racconti e alle filastrocche, si alternano esercizi, problemi matematici, proverbi, giochi enigmistici e tanto altro, ognuno con lo scopo di esaltare il risparmio e la sua promozione²⁵. Giochi, ad esempio, come questo scioglilingua: «Avevo un salvadanaro da salvadanizzare: lo portai al maestro salvadanizzatore di salvadanari non c'era: mi misi a salvadanizzarlo da me e lo salvadanizzai meglio del mio maestro salvadanizzatore di salvadanari»²⁶.

All'educazione al risparmio attraverso il gioco, si affianca l'esaltazione delle imprese del regime, grazie a una propaganda volta a esaltare il mito «degli italiani brava gente», amici dei popoli conquistati e portatori di civiltà, come il racconto del pastore albanese Nicola e del suo nipotino Mirko che, incontrando un soldato italiano, testimoniano il rapporto di amicizia esistente fra i due popoli, definitivamente certificato dall'annessione dell'Albania all'Italia²⁷, avvenuta proprio nel 1939, e la conquista dell'Impero etiope, esaltata dalla storia intitolata *Faccetta nera*, nella quale una piccola bambina autoctona, diventata orfana di madre, perché «cattivo Deisciò bicchiata [...] con frusta. Finché mia mama caduta...Morta! Ih...ih...»²⁸, viene accolta e poi vendicata dai buoni soldati italiani, che alla fine del racconto, nel regalarle delle monetine, le offrono «una nuova Madre, grande e pietosa: l'Italia!»²⁹.

Non mancano, poi, pregiudizi antisemiti, avvalorati dalla tematica del denaro, alla quale strettamente si legano, e legittimati dalle recenti leggi razziali. È il caso dell'Avaro, uno dei personaggi de *Il girotondo del salvadanaro (fantasia in un atto)*, una piccola opera teatrale, inserita nel testo. Pur non essendo mai dichiarato esplicitamente, il personaggio presenta tutti i tratti caratteristici e gli stereotipi che l'immaginario razzista del tempo attribuiva alla figura dell'ebreo³⁰, come la kippah, il sacco delle monete e il naso adunco. Ancora più

²⁴ *Ibid.*, pp. 5-6.

²⁵ Il libro fu, per altro, giudicato piuttosto positivamente da Michele Mastropaolo, che ne scrisse su «I diritti della scuola» una recensione non priva di qualche vaga critica al tema: «Ernesto Ambrosi e Mario Giusti hanno scritto in collaborazione *La prima sorgente* (Livorno, Società ed. Tirrena, pp. 116, lire 6), un simpatico volumetto a fondo propagandistico. Il tema dirò così obbligatorio è il risparmio, e sembrerebbe che dovessero esserne castigati l'ispirazione e la spontaneità. Invece no, ché attraverso raccontini e monologhi e scenette gli Autori han mantenuto spigliatezza e agilità, per cui passano quasi inavvertite le finalità pratiche del libro», M. Mastropaolo, *Letteratura infantile*, «I diritti della scuola», n. 2, 20 ottobre 1940, p. 12.

²⁶ *Ibid.*, p. 88.

²⁷ G. Villari, *Italia in Albania*, Roma, Novalogos, 2020.

²⁸ Ambrosi, Giusti, *La prima sorgente*, cit., p. 32.

²⁹ *Ibid.*, p. 34.

³⁰ Tali stereotipi, avvalorati da riviste come «La difesa della razza», erano presenti anche all'interno della pubblicistica per l'infanzia, basti pensare alla celebre striscia di E. De Seta, *La*

esplicito, durante la sua entrata in scena, è il riferimento a Esaù, personaggio dell'Antico Testamento le cui vicende sono narrate nel libro della Genesi:

L'AVARO (entra da destra. Tipo studiatamente gretto, serra al petto un sacchetto su cui è marcata in nero una cifra con molti zeri. Rauco e guardingo)

O sacchetto
mio diletto,
di monete scintillanti,
tutte d'oro;
io t'adoro!
Sono magro come un osso
e digiuno a più non posso,
perché vo, che ingrassi tu,
sempre più,
sempre più,
per la barba di Esaù,
o sacchetto,
mio diletto!

O sacchetto
mio diletto,
di monete scintillanti,
saltellanti,
tutte d'oro;
io t'adoro.
Nella misera stanzetta
c'è una fioca lucernetta,
ragnateli e nulla più;
ma lassù,
ci sei tu,
adorato sempre più,
o diletto mio sacchetto! (*Esce da destra, guardandosi sempre intorno sospettoso*)³¹.

Questo testo, forse più del precedente, è un esempio evidente di come, all'interno dello stato totalitario, la politica del regime andasse ad abbracciare i più diversi aspetti della vita comune, entrando non solo nella scuola, ma anche nel tempo libero dei ragazzi, trasformando in propaganda, anche il più semplice svago.

Interessante, da questo punto di vista, è l'esempio dei periodici, strumenti editoriali estranei alla scuola, che, tuttavia, vennero presto scoperti e sfruttati

storia di Assalonne Mordivò, «Il Balilla», n. 4, 1939. Sull'immaginario antisemita, si rimanda a L. Malvano, Fascismo e politica dell'immagine, Torino, Bollati Boringhieri, 1988, p. 193; V. Pisanty, Educare all'odio. La difesa della razza, 1938-1943, Milano, Motta online, 2003; F. Cassata, La difesa della razza politica, ideologia e immagine del razzismo fascista, Torino, Einaudi, 2008.

³¹ Ambrosi, Giusti, *La prima sorgente*, cit., p. 109.

dal regime. Grandi veicoli di idee, questi rappresentavano, infatti, un grande strumento nelle mani della dittatura, che grazie alle storie, alle rubriche e alle immagini in essi contenuti, aveva la possibilità di avvalorare le sue tesi, coprendo i suoi eccessi sotto il mantello del gioco e del divertimento. Ciò diventa evidente soprattutto con la guerra in Etiopia. È il caso de «Il Piccolo Risparmiatore», un periodico mensile edito, a partire dal 1930 e fino al 1943, dalla Federazione delle Casse di Risparmio dell'Emilia e delle Venezie³². Per quanto il giornalino avesse già come scopo quello di sensibilizzare i bambini a comportamenti virtuosi, a partire dalla guerra in Etiopia, questo assunse un carattere fortemente propagandistico, portando avanti una campagna fortemente autarchica, basata sul “gioco del risparmio”. Nel giornalino, infatti, alle vignette, si alternavano spazi dedicati all’Africa Orientale, giochi e concorsi a premi, come *Gara a tappe per i propagandisti*, una competizione, sia per i singoli bambini che per intere scuole, che si basava sull’accumulare, nel corso di un anno, più denaro in un libretto di risparmio appositamente emesso.

Lo scopo del periodico veniva, del resto, ben spiegato nello spazio dedicato ai più grandi, dal titolo *Leggi, papà*:

Questo giornalino è tutto dei bimbi, fatto e scritto per loro affinché insieme con tante altre belle e buone cose, imparino anche quella, non meno bella buona e necessaria, di spendere bene quel denaro di cui o presto o tardi potranno in qualche modo venire in possesso. [...] Spendere bene e quindi risparmiare è sempre una cosa buona, utile vantaggiosissima per sé, per la famiglia, per la società, per la Patria³³.

Degne di nota, da un punto di vista non solo storico-educativo, ma anche storico-sociale, sono le rubriche epistolari, come *Intorno a nonno Brontolone*, nella quale bambini e bambine scrivevano al sedicente vegliardo per informarlo dei loro sforzi nel risparmiare qualche soldo. Il quadro che esce dall’esame di queste letterine, infatti, è quello di una nazione fortemente stratificata, sia in ambito sociale che economico. Alle bambine Lucetta ed Erina di Modena³⁴, che nel 1936, sensibilizzate dalle campagne del regime, raccontavano di aver

³² «Si tratta di un giornalino modellato sul prototipo di maggior successo, il «Corriere dei Piccoli», nel quale la contraddizione fra progetto culturale (il risparmio) e forme di comunicazione ‘nuove’ (vignette, giochi, racconti, disegni) risulta assai felice e pienamente riuscita. Lo dirigevano due maestri, Guido Pasini e L. Guerrini, ma vera anima ne era Icilio Missiroli, insieme ad Ettore Nandiani, ben presto affermatosi come illustratore ‘ufficiale’ del periodico. Uscì per la prima volta il 31 ottobre 1932, in occasione della Giornata del risparmio, e fu inizialmente diffuso in 50-60000 copie. Successivamente, fu inviato regolarmente e gratuitamente ai bambini titolari di un libretto di risparmio», R. Balzani, *Il forziere della città. La Cassa dei risparmi e la società forlivese dalle origini al secondo dopoguerra*, Bologna, il Mulino, 2000, p. 216. La datazione riportata nel testo di Balzani lascia qualche dubbio, che sarebbe il caso, in futuro, di verificare. Il primo dei numeri del periodico conservati presso il MuSEd, il n. 1 del 1936, riporta, infatti, «Anno VI».

³³ «Il Piccolo Risparmiatore», n. 1, 31 ottobre 1936.

³⁴ *Ibid.*

rinunciato alle vacanze in montagna per mettere i soldi della villeggiatura nel loro libretto, si contrapponeva, ad esempio, Wally di Cerredolo di Torrano, fiera per aver risparmiato 35 lire delle 48 guadagnate vendendo 8 conigli³⁵. Un paese, dunque, dove ad un'infanzia borghese e facoltosa, minoritaria ma fortemente rappresentata nei vari prodotti editoriali come i periodici, dei quali era la principale acquirente, se ne contrapponeva un'altra molto più numerosa, composta dai figli del mondo contadino, per la quale il risparmio, più che un gioco temporaneo, rappresentava una realtà costante.

2. *Un mago e un elmo pieno d'oro*

È, però, attraverso il mondo del fantastico, seppur chiaramente ispirato agli avvenimenti contemporanei, che il regime aveva la possibilità di far comprendere ai bambini il complesso tema delle sanzioni e della resistenza a queste, sviluppando nei più giovani quell'orgoglio che, secondo la propaganda nazionalista, ogni italiano doveva provare. La fiaba, infatti, si configurava come «vero e proprio filtro tra la realtà drammatica della guerra e delle difficoltà economiche e il racconto di sé che il regime andava intessendo»³⁶. Nel testo del 1937, *La più bella leggenda del mondo*, Maria Bruna Lamacchia raccontava le recentissime vicende della guerra in Etiopia, attraverso il personaggio del grande mago Vincitutto, un chiaro alter ego di Mussolini³⁷, che era nato «dal cratere di un vulcano» e regnava sulla più bella città del mondo, Soledoro, che aveva chiese, monumenti, ville e fontane e dove non c'era mai una ribellione, mai un disordine. I coraggiosi bambini e le giudiziose e amorevoli bambine della città, amati dal mago, erano divisi in leoncini e api industriali (Balilla e Piccole Italiane).

Vincitutto era, però, preoccupato dalla crescita demografica di Soledoro, nella quale il cibo era diventato insufficiente, e, cercando disperatamente una soluzione per il suo popolo, guardò oltre confine, verso una terra lontana che era ricca e abitata da pochi «selvaggi», nella quale i cittadini di Soledoro avrebbero potuto espandersi e prosperare.

A mille miglia, lontano da Soledoro, oltre il mare, v'era una terra chiamata Negrina. Era

³⁵ «Il Piccolo Risparmiatore», n. 6, 31 marzo 1937.

³⁶ D. Montino, *Le parole educate: libri e quaderni tra fascismo e Repubblica*, Milano, Se-
lene, 2005, p. 66.

³⁷ L'uso di personaggi tipici del racconto fiabesco, come maghi e fate, così come il racconto canonizzato dell'Abissinia liberata dal governo barbaro del Negus, risulta molto comune all'interno della pubblicistica per bambini del tempo, come ben evidenziato da E.R. Laforgia, *Il colonialismo italiano spiegato ai fanciulli*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori fra Otto e Novecento*, Milano, FrancoAngeli, 2004, pp. 227-239.

una terra piena d'ogni ricchezza: aveva campi coltivati, miniere di ferro, di petrolio, di carbon fossile, ecc.

Era abitata da uomini selvaggi, neri come il carbone. Molti di essi erano schiavi, legati con le catene alle mani e ai piedi, costretti a fare lavori durissimi a colpi di frustate.

Negrina, oltre ad essere una terra ricca, era anche immensa, mentre i selvaggi erano pochi e non sapevano che farne di tutte quelle miniere e di tutti quei campi distesi sotto il sole ardente. Ad essi bastava ben poco di tutto quello che Negrina produceva³⁸.

Il riferimento ovviamente è all'Etiopia e al mito, esaltato dal fascismo, del «posto al sole», dove le grandi masse contadine del paese avrebbero potuto prosperare, portando non solo «civiltà», ma anche «libertà»³⁹, dal momento che sulla terra di Negrina regnava un perfido capo, chiamato Moro, il quale «era tutto nero: nero il corpo, nero il viso, neri gli occhi, neri i grossi denti, nera persino la lingua»⁴⁰ e schiavizzava il suo popolo, che doveva fare per lui tutti i lavori più duri, come tirare l'aratro e i carri.

Ma le fortune di Soledoro non facevano piacere alle altre potenze, invidiose del mago Vincitutto e del suo successo. In particolar modo due città, Attaccabrighe e Voltafaccia (probabilmente l'Inghilterra e la Francia), erano timorose che Soledoro potesse raggiungere una propria autonomia, così da non avere più bisogno di loro, e che diventasse la città più forte del mondo. Decisero quindi di punirla, mettendosi a capo di una coalizione composta da altre 52 città.

In che modo?

Esse sapevano che Soledoro, mentre era una bella città e aveva un popolo laborioso e pieno di buona volontà, non aveva molte ricchezze: le mancavano miniere d'oro, d'argento, di ferro, di carbon fossile e di petrolio; il grano, che producevano i suoi campi, non bastava ai suoi bisogni; anche la carne era insufficiente. Soledoro aveva bisogno di comprare molti prodotti dalle città vicine. Per vendicarsi, allora, le città vicine decisero di non vendere più nulla a Soledoro, così i suoi abitanti sarebbero morti di fame.

Morte a Soledoro! morte! morte!

E le cinquantaquattro città, presa la loro decisione, attesero o che gli abitanti di Soledoro si sottomettessero o che morissero di fame.

Si tratta, appunto, delle «inique sanzioni», alle quali però, ci informa sempre la storia, il mago decise di rispondere in modo molto energico. Convocan-

³⁸ M.B. Lamacchia, *La più bella leggenda del mondo*, Milano, La Prora, 1937, pp.26-28, Acs, Pcm, Uplas. a 693.

³⁹ Un mito che, come evidenzia Giorgio Canderolo, poteva essere utile al fascismo, non solo per dare illusioni di benessere, ma anche per impiegare grandi masse lavoratrici nelle industrie belliche, G. Canderolo, *Il fascismo e le sue guerre*, Milano, Feltrinelli, 1986, p. 346; *Lo spettacolo del fascismo*, Soveria Mannelli, Rubbettino, p. 277. Su tale propaganda all'interno dei cinegiornali, M. Cardillo, *Il duce in moviola. Politica e divismo nei cinegiornali e documentari «Luce»*, Bari, Dedalo, 1983.

⁴⁰ Lamacchia, *La più bella leggenda*, cit., p. 35.

do il popolo di Soledoro⁴¹ e spiegando loro che le altre città li odiavano e li condannavano alla fame, perché erano «bravi e laboriosi» e perché andavano «alla conquista di terre per lavorare» esortò loro a compiere ogni sacrificio.

Così la popolazione cominciò ad impegnarsi, risparmiando tutto ciò che poteva essere utile alla patria, come la carta, gli stracci e il cibo, che, come spiega il testo, fu razionalizzato.

La Patria aveva, inoltre, bisogno di metalli, «Ed ecco una nuova gara, nuove offerte generose di tutto il popolo. Macchine rotte, vecchi arnesi da lavoro, utensili superflui da cucina, ruote di carri, statuette di bronzo, ringhiere di giardini, tutto fu dato prontamente»⁴². Fondamentale, in questa nuova campagna, fu l'impegno dei leoncini, pienamente coinvolti, come tutto il resto della popolazione, nella grande impresa voluta dal mago.

Erano essi che si davano a ricercare nei più reconditi nascondigli della casa, nelle soffitte, nelle cantine gli oggetti di metallo abbandonati. Erano essi che andavano in giro con i carrettini e raccoglievano dalla strada persino un chiodo, persino uno spillo, perché nulla andasse disperso.

Erano essi che offrivano alla Patria il loro triciclo, il loro cerchio, la loro trombetta, il trenino, i balocchi che avevano più cari!

E quando proprio nulla avevano da offrire, si strappavano i bottoni della giacca e dei pantaloncini e li donavano⁴³.

Questo coinvolgimento dell'infanzia, lungi dall'essere solo frutto della finzione narrativa, trova riscontro anche in altre fonti⁴⁴, come i quaderni scola-

⁴¹ Il riferimento è, molto probabilmente, al discorso sull'entrata in guerra, tenuto a Roma da Mussolini il 2 ottobre 1935 e radiodiffuso in tutta la nazione: «Un'ora solenne sta per scoccare nella storia della Patria. Venti milioni di uomini occupano in questo momento le piazze di tutta Italia. Mai si vide nella storia del genere umano, spettacolo più gigantesco. Venti milioni di uomini: un cuore solo, una volontà sola, una decisione sola.[...] Non è soltanto un esercito che tende verso i suoi obiettivi, ma è un popolo intero di 44 milioni di anime, contro il quale si tenta di consumare la più nera delle ingiustizie: quella di toglierci un po' di posto al sole», B. Mussolini, *Opera omnia*, a cura di E. e D. Susmel, Firenze, La Fenice, 1951-1963, Vol. XXVII, pp. 158-159, citato in Acquarelli, *Il fascismo e l'immagine dell'Impero*, cap. 1 (e-book).

⁴² Lamacchia, *La più bella leggenda*, cit., p. 69.

⁴³ *Ibid.*, p. 70.

⁴⁴ Per quanto riguarda i diari scolastici, si veda quanto riportato da Juri Meda: «Il 3 ottobre 1935, infatti, in coincidenza con l'apertura dell'anno scolastico, le truppe italiane invasero l'Etiopia. Il 18 novembre 1935 ebbero inizio le sanzioni internazionali, deliberate dalla Società delle Nazioni contro l'Italia, le quali costrinsero il regime fascista a varare provvedimenti economici volti al raggiungimento della autonomia economica e a inaugurare quella che rimase probabilmente la campagna propagandistica meglio orchestrata: quella autarchica. L'intera società civile fu mobilitata a sostegno dello sforzo bellico nazionale, con il dono dell'oro alla patria e la 'battaglia agli sprechi'. Quando il 9 maggio 1936 Mussolini annunciò dal balcone di Palazzo Venezia la fine delle ostilità e proclamò la riapparizione dell'impero 'sui colli fatali di Roma', il regime fascista si trovava all'apice del proprio consenso politico. Fu in questo contesto che, con ogni probabilità, anche se l'esiguità delle fonti analizzate impone una certa prudenza, ebbe inizio l'utilizzo propagandistico del diario scolastico», Meda, *La politica quotidiana*, cit., p. 291.

stici, nei quali il risparmio⁴⁵ e la partecipazione dei bambini al grande sforzo collettivo non appaiono come azioni unicamente passive e finalizzate all'esaltazione delle imprese e delle iniziative fasciste, ma anche attive, grazie a una responsabilizzazione dell'infanzia che passa anche attraverso un piccolo sacrificio personale.

Si cita, a tal proposito, l'indicativo tema che Luisa, bambina di quarta elementare, scrisse nel 1935. La domanda di partenza, nella quale consiste la traccia del componimento, è a dir poco diretta:

Che cosa hai offerto alla Patria?

La nostra bella patria in questo momento così critico, ha bisogno del nostro aiuto, l'Italia alle sanzioni ha risposto con le controsanzioni, e quindi ha bisogno dell'oro, dell'argento, del ferro, della carta e altri metalli. Io ho offerto alla patria un orecchino d'oro e un po' di ferro.

L'ho offerto di cuore e con piacere.

La mamma e il babbo hanno offerto alla Patria il loro anello nuziale. Se avessimo ancora oro, o altri metalli li daremmo tutti quanti⁴⁶.

Nel diario della bambina si fa, inoltre, riferimento a quella che forse è l'iniziativa più famosa del periodo autarchico, ovvero la campagna per l'oro alla Patria e, soprattutto, all'evento propagandistico più rappresentativo di questa: la Giornata della Fede. Svoltasi il 18 dicembre 1935, un mese dopo, dunque, l'entrata in vigore delle sanzioni, questa consisteva in una serie di celebrazioni da svolgersi in tutto il paese, nelle quali le donne italiane si recavano presso il locale monumento ai caduti per donare spontaneamente le loro fedì d'oro, ricevendo in cambio dei semplici anelli di ferro benedetti. L'evento, dal forte impatto emotivo, ebbe il suo inizio ideale con la grande cerimonia svoltasi a Roma, nella quale la regina Elena del Montenegro, recatasi all'Altare della Patria, gettò la sua fede e quella del consorte, Vittorio Emanuele III, in un'ara votiva consistente in un grande elmo; una sorta di sacrificio pagano nei confronti della nazione, il cui racconto rientra in moltissimi dei quaderni esaminati:

Dimmi come si è celebrata a Roma «La giornata della Fede»

Oggi, 18 dicembre, compie un mese che gli stati stranieri hanno applicato alla nostra bella Patria le inique sanzioni.

Ed è oggi che tutte le donne d'Italia vogliono dare alla Patria il loro pegno d'amore e di

⁴⁵ I soldi e il guadagno, così come delle incombenze familiari, tra l'altro, non erano un tema nuovo alle trattazioni dei bambini, spesso figli di poveri mezzadri in un paese ancora in larga parte contadino. Tale argomento è messo ben in risalto dal lavoro di Claudio Rosati sui quaderni scolastici alla fine degli anni Venti. C. Rosati, «Bocche della verità». *Pratiche di scrittura scolastica alla fine degli anni Venti*, in Antonelli, Becchi (edd.), *Scritture bambine*, cit., p. 187.

⁴⁶ MuSEd, ADLR, Quaderni, 145, *Quaderno 5*.

devozione. Piazza Venezia è gremita di folla che da ogni parte di Roma viene a portare la sua offerta.

La nostra Augusta Sovrana ha pronunciato un messaggio che terminava con un augurio di Buon Natale a tutti coloro che combattono e lavorano per la grandezza d'Italia in Affrica (sic.) orientale. La nostra Regina ha consegnato per la prima il suo anello nuziale e quello del Re prenden(do) in cambio due anelli di ferro. Il vescovo ha benedetto tutti gli anelli ed allora donne del popolo, vecchiette, giovani spose hanno deposto nell'ara votiva, ove bruciava incenso profumato, il loro anello nuziale. Tutte ne sono tornate commosse, orgogliose di essere spose italiane e pronte a qualsiasi sacrificio⁴⁷.

All'evento sono dedicati diversi capitoli del testo di Lamacchia. La giornata della Fede, infatti, viene ricostruita dall'autrice attraverso le vicende della Fata della Bontà, che abitava con il suo sposo in un palazzo poco lontano dal castello del mago Vincitutto. Questa figura misericordiosa, che portava aiuto ai più poveri, «era nata in un piccolo paese lontano lontano, di là dal mare. Un giorno, un Principe di Soledoro si recò in quel piccolo paese e, vedendo la bella Fata la volle per sposa»⁴⁸. Fra tutti i gioielli che il Principe le regalò, questa scelse un semplice anello d'oro, simbolo del loro amore sincero, tanto da chiamarlo «il suo anello di fede». Fu proprio quell'anello d'oro, simbolicamente così prezioso, che la fata decise di donare alla Patria. L'offerta avvenne durante una grande cerimonia, dinnanzi al grande monumento ai caduti, per l'occasione decorato con ghirlande e bandiere, sul quale troneggiava un grande elmo d'acciaio. La fata arrivò circondata dalle Api Industriali.

A un cenno del Mago, la Fata si avvicinò all'altare. Il popolo, commosso, taceva. Si udiva soltanto la musica suonata da strumenti invisibili nell'aria, dove continuava la pioggia dei petali di rose.

La Fata chinò il capo e congiunse le mani in atto di preghiera.

Poi si tolse l'anello della fede dall'anulare della mano sinistra, e, dopo averlo mostrato al popolo, lo fece cadere nel grande elmo di acciaio.

Allora accadde una cosa straordinaria: tutte le spose di Soledoro, che portavano al dito l'anello della fede, se lo strapparono, si avvicinarono all'altare e lo gettarono nell'elmo.

Non una sposa rimase con l'anello al dito. Si empì quell'elmo e poi un altro e altri ancora fino a mille. Milioni di anelli d'oro furono offerti dalle donne, con uno slancio generoso, alla Patria⁴⁹.

La Giornata della Fede fu, probabilmente, uno dei momenti più alti e suggestivi della propaganda fascista, nonché uno dei più partecipati, nel quale più stretto risultò il legame tra regime e popolazione⁵⁰.

Terhoeven la definisce una «rappresentazione estetico-teatrale di massa»⁵¹, nella quale ad una funzione laica e profana, come la raccolta dell'oro, si so-

⁴⁷ MuSEd, ADLR, Quaderni, 111.

⁴⁸ Lamacchia, *La più bella leggenda*, cit., p. 56.

⁴⁹ *Ibid.*, pp. 65-66.

⁵⁰ Gentile, *Il culto del littorio*, cit., p. 174.

⁵¹ Terhoeven, *Oro alla Patria*, cit., p. 129.

stituisce una dimensione religiosa e sacra. L'evento, in particolar modo quello centrale, svoltosi a Roma presso l'Altare della Patria, rappresenta, infatti, una sintesi di molti registri comunicativi, ai quali partecipano diversi attori in un «gigantesco spazio scenico di una grande e coinvolgente recitazione collettiva»⁵², nella quale venne coinvolta, oltre alle varie autorità («il Partito», «il Trono» e «l'Altare»), anche la parte femminile della popolazione⁵³, considerata più emotiva e che, in quanto «custode del focolare», saliva adesso i gradini di quello posto nel punto più sacro per l'intera nazione.

Il coinvolgimento simultaneo di centinaia di migliaia di persone creò uno stretto legame tra i diversi scenari, rafforzando un senso di comunione tra i partecipanti che andava molto al di là dell'ambito locale. L'effetto complessivo della giornata fu il risultato di una peculiare miscela di elementi arcaici e moderni nell'utilizzo politico della piazza, considerando anche gli strumenti tecnici di comunicazione che resero possibile una diffusione su scala nazionale, almeno per la parte svoltasi a Roma e a Pontinia. A livello nazionale la scenografia, già di per sé di grande effetto, fu costruita da quella «piazza privilegiata, a Roma, che assurge per vent'anni a metafora e concentrato di tutte le piazze d'Italia»: piazza Venezia. Già alla fine di novembre qualcuno di coloro che si erano autonomamente consiglieri del partito aveva proposto di trasferire la raccolta dell'oro dagli uffici del Pnf, dimessi e poco accessibili, all'Altare della patria⁵⁴.

Un sacrificio laico per la vittoria, dunque, che avrebbe visto la sua positiva realizzazione il 5 maggio del 1936 con l'entrata delle truppe italiane ad Addis Abeba e il 9 maggio dello stesso anno, quando dal balcone di piazza Venezia Mussolini annunciò la nascita dell'Impero. Ricordando trionfalmente quei momenti nel testo del 1937, *Racconti del legionario*⁵⁵, illustrato da Carlo Nicco, l'autore, Federico Bonazzi, offriva ai giovani lettori il giusto riconoscimento al loro impegno:

Voi tutti, bimbi d'Italia, con trepidazione ed amore ci avete seguiti durante la guerra. Non ci avete fatti mancare nemmeno i vostri incitamenti e le parole di fede; ci siete sempre stati vicini con il vostro entusiasmo e le vostre preghiere.

Durante la campagna d'Africa, infatti, ognuno di noi ebbe lettere da Piccole Italiane e da Balilla e persino da Figli della Lupa. [...] Ma l'argomento di tutti i nostri piccoli – e lo diciamo con vanto – furono sempre le sanzioni. Bisogna leggere come essi bollavano le nazioni straniere che si erano schierate contro l'Italia nostra, per aderire alle ciarle degli incivili bianchi e neri. «Anche noi combattiamo nelle nostre case – scriveva una Piccola

⁵² M. Isnenghi, *L'Italia del fascio*, Firenze, Giunti, 1996, p. 5. Rispetto ai grandi eventi collettivi e pubblici, si veda dello stesso autore Id. *L'Italia in piazza. I luoghi della vita pubblica dal 1848 ai giorni nostri*, Milano, Mondadori, 1994.

⁵³ Si veda V. De Grazia, *Le donne nel regime fascista*, Venezia, Marsilio, 2023, cap. I.

⁵⁴ Terhoeven, *Oro alla Patria*, cit., p. 130.

⁵⁵ Che riporta una dedica «A tutti i bimbi d'Italia che raccolsero ferro ed oro per la Patria in guerra».

Italiana – rinunciando a tante cose, facendo pure dei sacrifici, perché la nostra cara Patria resista alle sanzioni»⁵⁶.

Conclusioni

Le iniziative messe in atto dal regime per fra fronte alla carenza di materie prime, come la raccolta dell'oro e del ferro, unite alla lotta contro gli sprechi, trovarono un notevole riscontro in un popolo, come quello italiano che, oltre a partire da una situazione economica di per sé non rosea, vedeva le sue origini in una cultura contadina profondamente radicata, nella quale l'idea del risparmio come valore fondante era da sempre presente. A ciò va, poi, aggiunta l'azione propagandistica del regime, capace di assimilare i sacrifici privati dei cittadini ad azioni propedeutiche alla guerra, come atti di un popolo guerriero, seppur non in armi. Una visione, quella militarista⁵⁷ che aveva individuato nella capacità di conquistare gli animi dei più piccoli, una parte essenziale per la buona riuscita dell'intera operazione. A tal proposito risulta interessante quanto emerge dal quaderno di Augusto, bambino genovese di quarta elementare che, all'interno di un tema dedicato agli sforzi per la patria, scriveva al padre, partito per combattere in Etiopia, che «anche i bambini per aiutare l'Italia in questo periodo di sanzioni, hanno offerto: carta-ferro-argento-e qualcuno anche un po di oro»⁵⁸. Un processo mentale che, creando una correlazione fra il padre soldato e il figlio scolaro e balilla, rinnovava il culto di una nazione in armi, pienamente fedele al fascismo e al suo capo.

In conclusione, la politica autarchica e del risparmio rappresenta senza dubbio uno dei momenti più interessanti della storia fascista, la cui importanza in ambito educativo, per quanto non ignorata dalla letteratura di settore⁵⁹, andrebbe senz'altro approfondita. Le possibilità offerte da tale indagine sono, infatti molteplici, toccando gli aspetti più disparati della vita nazionale durante il regime, dalla storia politico-economica fino a quella sociale e di costume. Basti pensare, ad esempio, all'interesse rappresentato dall'alimentazione e dalla battaglia contro gli sprechi⁶⁰; un argomento di ricerca che, partendo da

⁵⁶ F. Bonazzi, *Racconti del legionario*, Torino, SEI, 1937, pp. 16-18, Acs, Pcm, Uplas.a 831.

⁵⁷ Sul militarismo si rimanda a A. Mariotti, *Gioventù eroica. Il mito del sacrificio rigenerante nella scuola fascista (1926-1943)*, «Intersezioni», n. 1, aprile 2015; G. Gabrielli, *Educato alla guerra: nazionalizzazione militarizzazione dell'infanzia nella prima metà del Novecento*, Verona, Ombre corte, 2016.

⁵⁸ MuSEd, ADLR, Quaderni, 153.03. *Sanzioni e controsanzioni*.

⁵⁹ È di recentissima pubblicazione, ad esempio, l'articolo di G. Seveso, *Dall'autarchia alla vittoria. Un'analisi dei testi di bambini e bambine per il concorso a premi indetto dalla Banca Popolare di Milano – Ufficio Propaganda del Risparmio(1939-1941)*, «MeTis. Mondi educativi. Temi, indagini, suggestioni», vol. 14, n. 2, 2024, pp. 116-133.

⁶⁰ Sull'alimentazione si veda P. Sorcinelli, *Gli italiani e il cibo. Dalla polenta ai cracker*,

un contesto generale, come quello relativo alla politica internazionale e all'emanazione delle sanzioni, giunge fino al particolare, toccando direttamente la vita dei cittadini e che, attraverso una fonte davvero interessante, come i manuali di economia domestica⁶¹ e i ricettari autarchici, può offrire stimolanti possibilità d'indagine.

Milano, Mondadori, 1999.

⁶¹ Si cita, a titolo di esempio, un interessante libello uscito durante la Seconda guerra mondiale, contenente una vasta gamma di consigli per evitare gli sprechi, e rivolto alle «brave massaie» italiane, *Non spredate*, Bologna, S. A. poligrafici Il resto del Carlino, 1941.

«In 1895, in a damp old sacristy in Mompiano...». The image of the Agazzi infant school on Italian national television

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ABSTRACT: This study examines the documentary *Il significato attuale del metodo agazziano* [*The Contemporary Meaning of the Agazzi Method*], broadcast by Rai in 1979. After outlining the key stages in the early childhood education experiment conducted in Brescia by the sisters Rosa and Carolina Agazzi, with the support of their mentor Pietro Pasquali, the research reviews the historical backdrop to the decision to use television to introduce the Agazzis' educational project to a wider and more diverse audience than that previously targeted by the specialist literature. Further analysis is devoted to how the television program presented and interpreted this piece of national history, and how it proved largely successful in bridging the gap between past and present. Overall, the study draws out the vivid image of the Agazzi infant school conveyed by the documentary while prompting reflection on various aspects of school memory.

EET/TEE KEYWORDS: Early childhood education; Pasquali-Agazzi method; Television; Collective school memory; Italy; XX Century.

1. *The Agazzi method in the first half of the twentieth century*

Initially emerging with little fanfare at the end of the nineteenth century, the early childhood education experiment pioneered by Rosa and Carolina Agazzi at their rural infant school in Mompiano (Brescia) gradually garnered greater support and recognition¹. As is well known, the Agazzi sisters' method

¹ On the Agazzi sisters and the method they devised, see, among others, M. Bagnalasta Bàrilaam (ed.), *Rosa Agazzi nella cultura pedagogica italiana e nella realtà educativa della scuola materna*, Brescia, Istituto di Mompiano «Pasquali-Agazzi», 1995; M. Grazzini, *Sulle fonti*

drew on the work of Froebel, which they reinterpreted to align with the new concept of childhood that was emerging in the late 1800s and early 1900s and stripped of its underlying mysticism and immanentism. Indeed, their approach revolved around the belief that children should actively participate in school life². The model of infant school that the two sisters developed and implemented in Mompiano was designed to fulfil children's need to be active, play, learn, explore, and spend time in a nurturing and calm environment. It was also intended to instil habits of cleanliness and order and to foster independence.

From the early twentieth century onwards, the reformist ideas of the Agazzi sisters began to feature more strongly in the educational and pedagogical debate, largely due to the tireless commitment of their mentor, Pietro Pasquali³. As the head of Brescia's elementary schools and kindergartens, Pasquali not only authored several works on the leading principles of the Agazzi educational approach⁴, but he also played a crucial part in getting the Agazzi's kindergarten recognized by the Public Education Ministry. As a member of the Commission set up by Minister Luigi Credaro in 1910 to plan a complete overhaul of early childhood education institutions, Pasquali made a key contribution to drafting the first Italian government program for infant schools, helping to ensure that it reflected the Agazzi sisters' ideas⁵. In keeping with the reformed Froebelism implemented by the Agazzis, this document reiterated that infant schools were not schools in the traditional sense, but rather «maternal» educational institutions, where education was defined as «a set of actions, care, and

del Metodo Pasquali-Agazzi e altre questioni. Interpretazioni, testi e nuovi materiali, Brescia, Istituto di Mompiano «Pasquali-Agazzi», 2006; Id. (ed.), *Rosa Agazzi. Epistolario inedito (499 documenti, 1882-1950)*, Brescia, Istituto di Mompiano «Pasquali-Agazzi», 2015.

² On this, cf. R. Mazzetti, *Pietro Pasquali, le sorelle Agazzi e la riforma del fröbelismo in Italia*, Roma, Armando, 1962.

³ For further background on Pasquali, see S.S. Macchietti, *Pietro Pasquali tra scuola e società. Dall'ultimo Ottocento al primo Novecento: intuizioni e proposte di un educatore*, Brescia, Istituto di Mompiano «Pasquali-Agazzi», 1984 and the entries curated by M. Morandi in *Dizionario biografico degli italiani*, vol. 81, 2014, <[https://www.treccani.it/enciclopedia/pietro-pasquali_\(Dizionario_Biografico\)/?search=PASQUALI%2C%20Pietro](https://www.treccani.it/enciclopedia/pietro-pasquali_(Dizionario_Biografico)/?search=PASQUALI%2C%20Pietro)> (last access: 30-07-2024) and by M. Brunelli, S. Macchietti in G. Chiosso, R. Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Editrice Bibliografica.

⁴ Cf. P. Pasquali, *Il nuovo asilo. Guida per le maestre e le madri nell'educazione della prima infanzia sulle tracce dell'asilo di Mompiano*, Brescia, Angelo Canossi e C., 1903 e Id., *Il nuovo spirito dell'asilo*, Milano, La Voce delle maestre d'asilo, 1910.

⁵ In the spring of 1912, when presenting his draft measure to the lower house of parliament, Credaro explained that the document included instructions for promoting the application of the Froebel method in infant schools, suitably revisited in light of the Agazzi sisters' experience, cf. T. Pironi, *Il contributo di Maria Montessori al rinnovamento della scuola dell'infanzia in Italia nel primo ventennio del Novecento*, in A. Ascenzi, R. Sani (edd.), *L'innovazione pedagogica e didattica nel sistema formativo italiano dall'Unità al secondo dopoguerra*, Roma, Studium, 2022, p. 177. In relation to these programmatic guidelines, which were ultimately approved via Royal Decree No. 27 of 04 January 1914, cf. F.V. Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, Brescia, La Scuola, 1970, pp. 27-39, 113-193.

activities, [as] an everyday field of patient and caring action, rather than as a place for intellectual training and teaching»⁶. In light of these principles, the government program allowed much scope for «maternal education», practical life skills, and moral and social education⁷. The endorsement of the Agazzi method at the ministerial level was reaffirmed a few years later when Giuseppe Lombardo Radice incorporated it into the new early childhood education program that flanked Giovanni Gentile's 1923 school reform⁸.

During the 1920s, the history of the Agazzi movement was significantly influenced by the support of Catholics, who had previously maintained a reserved stance toward it⁹. After separating it from its secular and positivist origins, they reinterpreted it through a Catholic lens and adopted it as a model for their own infant schools¹⁰. Thanks to extensive dissemination efforts by the publishing house La Scuola¹¹, in collaboration with the Italian Educational Association (Aei)¹², alongside support from the government of the day, the

⁶ *Ibid.*, p. 192, italics in the original.

⁷ Specifically, in relation to the «maternal education» so highly valued by the Agazzis, the members of the ministerial committee explained that this kind of schooling should be focused on instilling «habits of cleanliness and order as well as practical skills». They emphasized that these aims constituted «the primary, and indeed the fundamental, program of the poorest public kindergartens, in both rural and urban areas»: *Istruzioni, Programmi e Orari per gli Asili infantili. Approvati con R.D. 4 Gennaio 1914 n. 27*, Brescia, La Scuola, 1915, p. 27.

⁸ In the ministerial order of 11 November 1923, implementing Royal Decree No. 2185 of 01 October entitled *Ordinamento dei gradi scolastici e dei programmi didattici della scuola elementare* [*The Organization of Elementary School Grades and Curricula*], it was specified that the previous elementary school program had been repealed. However, there was no mention of changes to the kindergarten program, hence the 1914 program remained in effect for infant schools. In the 1923 decree, the guidelines for kindergartens were reduced to a few brief lines and were presented in conjunction with the guidelines for elementary school, for which infant school was now designated as the «preparatory level». Lombardo Radice himself noted in a preface penned in 1933, when the 1914 programs were republished, that these had been endorsed by Minister Gentile in 1923, cf. *Istruzioni programmi e orari per gli asili infantili e i giardini d'infanzia*, ristampa con prefazione di Giuseppe Lombardo Radice, Roma, Associazione per il Mezzogiorno editrice, 1933, p. 7.

⁹ Cf. F. De Giorgi, *I cattolici e l'infanzia a scuola. Il «metodo italiano»*, «Rivista di storia del cristianesimo», vol. IX, n. 1, gennaio-giugno 2012, pp. 71-88, specifically pp. 74-76.

¹⁰ To grasp the importance and implications of this development, it is important to note that in the early 1900s, the majority of infant schools – approximately 75% – were run by charitable institutions or by church bodies on behalf of private patrons. Furthermore, the involvement of female religious congregations in early childhood education remained substantial throughout the first four decades of the twentieth century, cf. R. Sani, *L'educazione dell'infanzia dall'età giolittiana alla Carta Bottai*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al Centro-sinistra*, Brescia, La Scuola, 2001, pp. 240-241.

¹¹ For further historical background on this Brescia-based publishing house, which is still in operation today, publishing schoolbooks and developing resources for teacher training and professional development, see L. Pazzaglia (ed.), *Editrice La Scuola 1904-2004. Catalogo storico*, Brescia, La Scuola, 2004.

¹² This Catholic association adopted the Agazzi approach in its own training schools and

early 1930s saw a veritable «triumph» of the Agazzi method¹³. Backed by the Ministry of Public Education both during¹⁴ and after¹⁵ the Second World War, the Agazzi approach continued to strongly influence the programmatic directives for kindergartens, remaining prominent at least until the *Orientamenti per l'attività educativa della scuola materna* [*Guidelines for the Educational Activity of Maternal Schools*] of 1958¹⁶.

kindergartens, cf. A.M. Ferrari, *L'Associazione Educatrice Italiana e il metodo delle Sorelle Agazzi*, in *Rosa Agazzi a dieci anni dalla morte*, Brescia, La Scuola, 1961, pp. 57-58.

¹³ La Direzione, *Il Corso Agazzi e la diffusione del Metodo Agazziano*, «Pro Infantia», a. XX, n. 21, 26 marzo 1933, pp. 529-533, citation on p. 529. On these issues and, more broadly, on the role of La Scuola journal «Pro Infantia» (later «Scuola materna») in disseminating the Agazzi method, of which the periodical described itself as an «exhibitor and promoter» (L'Amministrazione e la Direzione del Pro Infantia, *Il «Pro Infantia» nel nuovo anno scolastico 1929-30*, «Pro Infantia», a. XVII, n. 1, 10 ottobre 1929, p. 1), cf. R. Bressanelli, *L'«intrapresa ardita». La rivista per gli asili «Pro Infantia» nel suo primo ventennio di vita (1913-1933)*, Lecce, Pensa MultiMedia, 2023, pp. 237 and ss. The success of the Agazzi method during the late 1920s and early 1930s is borne out by the fact that in the 1929-1930 school year, not only was the Agazzi method included for the first time among the educational approaches envisaged in the ministerial survey of infant schools, but it also emerged as that most widely implemented. Out of 9,546 early childhood education institutions, 2,219 reported using the Agazzi method, 1,458 followed the Froebel method, 1, 283 the Aperti method, and 422 the Montessori method, while 4, 164 were classified as «other types»: cf. G. Chiaromonte, *Gli asili infantili nell'anno 1929-30*, «Annali dell'istruzione elementare», vol. VI, n. 5, ottobre 1931, pp. 17-31, citation on p. 27.

¹⁴ Suffice it to recall that on 06 December 1941, Minister of National Education Giuseppe Bottai – while presenting the Agazzi sisters with the «Stella d'oro al merito della scuola» [Golden Star Award for Merit in the School Sector] in Brescia and recognising the value of their work, which he described as «a brilliant, happy foretaste of the Italian school system as defined by the Schools Charter» – stated: «Nowadays, when one speaks of Italian schooling, one means Agazzi schooling and vice versa»: *Il Ministro Bottai premia l'opera di Rosa e Carolina Agazzi*, «Scuola materna», vol. XXVIII, n. 9, 24 dicembre 1941, p. 179.

¹⁵ In June 1950, during the National Maternal School Days held in Brescia, Trento, and Trieste in honour of Rosa Agazzi, Minister of Public Education Guido Gonella declared: «The Agazzi method is, and must remain, the method of the Italian infant school system. We recognize the Agazzi method as the method for Italian kindergartens due to its own intrinsic value and the current de facto situation. The only valid and effective method, indeed, is that which is embraced by the teacher with conviction, sensitivity, and unceasing creativity. This is precisely what has occurred with the Agazzi method», cf. G. Gonella, *Il metodo che la scuola materna italiana si è scelto*, in *In memoria di Rosa Agazzi*, a special edition of «Scuola materna», vol. XXXVII, n. 10-12, 30 aprile 1951, Brescia, Centro Didattico Nazionale per la Scuola Materna, 1961, p. 158.

¹⁶ Although these *Guidelines* (published in Presidential Decree No. 584 of 11 June 1958) made it clear that they did not «mandate one particular educational method over another» (Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, cit., p. 235), their «evident Agazzi influence» may easily be inferred from their insistence on the practice of everyday life skills as well as their inherent critique of schoolishness and corresponding emphasis on play, hands-on learning, spoken language, drawing, and singing, cf. E. Catarsi, *L'asilo e la scuola dell'infanzia. Storia della scuola «materna» e dei suoi programmi dall'Ottocento ai giorni nostri*, Scandicci (Firenze), La Nuova Italia, 2000, p. 233.

2. *The crisis and revival of the Agazzi method*

While the Agazzi method had demonstrated considerable resilience to socio-cultural changes in the first half of the twentieth century, it began to show signs of weakness amid the turbulent climate of the 1960s and 1970s. This decline was driven both by the void left by the death of its founders¹⁷ and by the major political, social, and cultural changes affecting the Italian infant school sector during that period¹⁸. Specifically, following the publication of the 1958 *Orientamenti*, the issue of nationalizing infant school education became a central topic in political and education debates. After protracted parliamentary discussions, the state infant school system was set up in 1968¹⁹. The *Orientamenti dell'attività educativa nelle scuole materne statali*²⁰ [Guidelines for Educational Activities in State Maternal Schools] were published the following year and remained in effect until 1991²¹. While these guidelines – which were drawn up by a group of scholars from diverse cultural backgrounds, a pluralistic approach without precedent at the time – introduced significant innovations (such as recognizing the child as a social subject situated in a historical context²²), they did not, in practice, represent a «clear and absolute departure» from the instructions previously in effect²³. In relation to our focus of inquiry here, it should be noted that while the document specified that, based on the principle of educational freedom, it was not intended to interfere with «specific teaching choices»²⁴, it did retain the distinctly Agazzian term «maternal school» and reflected certain «distinctive characteristics» of the Agazzi edu-

¹⁷ Carolina and Rosa Agazzi passed away in 1945 and 1951, respectively; Pietro Pasquali had predeceased them in 1921.

¹⁸ On the leading events in the history of Italian infant schools across the 1960s and 1970s, see Catarsi, *L'asilo e la scuola dell'infanzia. Storia della scuola «materna» e dei suoi programmi dall'Ottocento ai giorni nostri*, cit., pp. 235-323.

¹⁹ For an account of the extenuating legislative process that led to Law No. 444 of March 18, 1968, see L. Pazzaglia, *La politica scolastica del centro-sinistra*, in Id., R. Sani (ed.), *Scuola e società nell'Italia unita. Dalla legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 481-495 and D. Gabusi, *La svolta democratica nell'istruzione italiana. Luigi Gui e la politica scolastica del centro-sinistra*, Brescia, La Scuola, 2010, pp. 203-264.

²⁰ Presidential Decree No. 647 of 10 September 1969, *Orientamenti dell'attività educativa nelle scuole materne statali*.

²¹ Ministerial Decree of 03 June 1991, *Orientamenti dell'attività educativa nelle scuole materne statali*.

²² According to the *Indirizzi generali* [General guidelines] section of this document, its purpose was to «highlight the educational needs of the child and the social and pedagogical needs [...] that the infant school system [was required to] address» within contemporary society, cf. Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, cit., p. 238.

²³ *Ibid.*, p. 81.

²⁴ *Ibid.*, p. 238. After introducing this issue in a first section entitled *Finalità della scuola materna e carattere degli Orientamenti* [Purpose of Infant School and Nature of the Guidelines], the following section on *Libertà e responsabilità didattica* [Freedom and Responsibility in Teaching] clarified that: «The criteria for, and methods of, educational action cannot be

cational approach. It also suggested «certain focuses inspired by» the Agazzi method, although these influences were difficult to «identify on the surface»²⁵.

Despite this state of affairs, during the 1970s – a period that saw the rise of theories of educational permissiveness and the proliferation of so-called «alternative» infant schools (such as those associated with the work of Bruno Ciari with Bologna City Council, or the project led by Loris Malaguzzi in Reggio Emilia²⁶) – the Agazzi-style infant school began to face criticism. It was accused of «having sacrificed the child to orderliness [...], having failed to open up the classroom, to open up the school to the ‘social’ dimension, and having maintained a limited view of the ‘kindergarten’ as a family»²⁷.

Recognizing that the Agazzi project was losing momentum amid these reservations, scholars affiliated with the «Pasquali-Agazzi» Institute – a «centre for research, documentation, and education projects» that had been set up in Mompiano in 1964 with a view to «keeping the Agazzi spirit alive and open-ended»²⁸ – felt the urgent need to reinterpret the Agazzi educational tradition in light of the educational challenges of the day. Up to that point, researchers of the Agazzi method had primarily focused on its core principles and scientific validity with respect to the historical and cultural context in which it had

predetermined. The State’s recognition of academic freedom is reflected, among other things, in freedom of choice concerning teaching methods»: *ibid.*

²⁵ S.S. Macchietti, *Il metodo Agazzi «oggi»*, in A. Agazzi, S.S. Macchietti, *L’educazione dell’infanzia nella scuola materna e il metodo Agazzi*, Brescia, La Scuola, 1991, pp. 147-171, citation on p. 151. On the Agazzian principles that permeated the *Orientamenti* of 1969, cf. *ibid.*, pp. 151-152.

²⁶ For more on these figures, see the biographical-bibliographical entries by M. D’Ascenzo and L. Bellatalla, respectively, in Chiosso, Sani (edd.), *DBE. Dizionario Biografico dell’Educazione 1800-2000*, cit. The characteristics of the alternative infant schools – presented as democratic institutions open to local communities, capable of bridging cultural differences, and with an emphasis on experimentation – were described in the inaugural issue of the journal «Infanzia» (which will be discussed later), cf. P. Bertolini, F. Frabboni, *Per una scuola dell’infanzia realmente alternativa*, «Infanzia», n. 1, ottobre 1973, pp. 5-10. Here, the aims of alternative infant schools were listed as meeting children’s needs, guaranteeing equal opportunities for all children, and becoming «a training ground for *authentic democracy and broad socialization*». As such, these schools sought to establish «*a two-way relationship between infant school and the society to which it belongs*», and to foster «*a model of child who is intellectually curious, socially independent and communicative, ethically spontaneous, emotionally vibrant, and aesthetically eager for diverse creative experiences*» (*ibid.*, pp. 6-7, italics in the original).

²⁷ S.S. Macchietti, *L’oggi del metodo Agazzi*, Brescia, Istituto di Mompiano «Pasquali-Agazzi», [1981], p. 19.

²⁸ *Statuto-Regolamento dell’Istituto di Mompiano «Pasquali-Agazzi»* [1964] in *Adeguamento alla legislazione vigente della gestione amministrativa e contabile dell’Istituto*, s.d. (Archivio dell’Istituto «Pasquali-Agazzi», Brescia). For a more detailed reconstruction of the history of this institution, see R. Bressanelli, C. Ghizzoni, «*Frugando fra le carte*». *I fondi documentari dell’Istituto «Pasquali Agazzi»: fonte per una storia dell’educazione infantile in Italia fra ’800 e ’900*, in A. Ascenzi, C. Covato, J. Meda (edd.), *La pratica educativa. Storia, memoria e patrimonio*, atti del 1° Congresso nazionale della Società Italiana per lo studio del Patrimonio Storico-Educativo (Palma de Mallorca, 20-23 novembre 2018), Macerata, eum, 2020, pp. 29-49.

originated and evolved. Now however, they realized that, if the Agazzi educational tradition was not to be lost altogether, it was essential to show that it still held intrinsic value on the contemporary historical-cultural scene.

Spurred by this newfound awareness, the Mompiano Institute launched a series of conferences during the 1970s. These events, led by distinguished academics in the field of education and primarily aimed at scholars and education practitioners, sought to reaffirm the contemporary value of the Agazzi method by drawing together past and present insights²⁹. In January 1981, during a two-day seminar on *L'oggi del metodo Agazzi* [The Agazzi Method Today], organized by the Department of Public Education of Brescia City Council and the «Pasquali-Agazzi» Institute to mark the thirtieth anniversary of Rosa Agazzi's death (Brescia, January 9-10, 1981), education specialist Sira Sirenella Macchietti, a scholar of the Agazzi method and an active collaborator of the Institute, articulated this new research perspective as follows:

Research on the Agazzi method has appeared [...] to be driven by the aim of exploring contemporary issues in light of the «wisdom» and experience of the past. Rather than extracting direct lessons and inspiration from past methods to address today's challenges, the goal has been to delve into their deeper meanings while reflecting on and verifying their current relevance. The idea has been to enhance educational insight, fostering the capacity for critical comparison and, where necessary, pushback against «new educational fads», which often stand in the way of accessing a well-rounded and authentic education. Instead of merely proposing teaching methods to be «imitated», there has been a shift towards drawing on past experiences to foster a process of building awareness, reaching beyond pedagogical «dogmatisms» and partial readings of educational challenges³⁰.

This plan to modernize the Agazzi model persisted until the early 2000s³¹, when the dynamism that had marked the early years of the «Pasquali-Agazzi»

²⁹ For example, the following are some of the seminars held between the mid-1970s and early 1980s: *Direttività e non direttività nell'educazione infantile: il metodo Agazzi e l'odierna problematica* [Directionality and Non-Directionality in Early Childhood Education: The Agazzi Method and the Challenges of Today] (Brescia, 24-25 maggio 1974), *L'educazione religiosa nel metodo Agazzi e nella scuola materna d'oggi* [Religious Education in the Agazzi Method and the Contemporary Infant School] (Brescia, 17-18 ottobre 1975), *Dalla scuola materna alla scuola elementare nella prospettiva agazziana e odierna* [From Infant School to Primary School From an Agazzian and Contemporary Perspective] (Brescia, 18-19 gennaio 1980), *L'oggi del metodo Agazzi* [The Agazzi Method Today] (Brescia, 9-10 gennaio 1981), *Ordine e creatività nella proposta agazziana e nella scuola materna oggi* [Order and creativity in the Agazzi approach and in the contemporary infant school] (Brescia, 13-14 novembre 1981). Until the early 1990s, these conferences were held every one or two years; however, in subsequent years, they became less frequent. The proceedings have been published in the series «Quaderni di Documentazione Pedagogica», which is edited by the Agazzi Institute in Mompiano. Today, this series runs to 39 volumes.

³⁰ Macchietti, *Il metodo Agazzi «oggi»*, cit., p. 153. The proceedings of the seminar were published in Ead., *L'oggi del metodo Agazzi*, cit.

³¹ In 2001, seven volumes were published as part of the book series «Quaderni di Documentazione Pedagogica» under the title *La pedagogia di Rosa Agazzi paradigma educativo per il 2000* (Istituto Pasquali-Agazzi, Centro studi pedagogici, Bergamo, Edizioni Junior, 2001).

Institute began to wane. Recently, however, there has been a renewed push to revitalize the Agazzi educational approach, as well as the research centre itself, in the context of a project launched by Brescia City Council in cooperation with the Catholic University³².

3. *The television documentary* Il significato attuale del metodo agazziano

Another expression of the effort to reinterpret the Agazzi model of education from a contemporary perspective was the documentary entitled *Il significato attuale del metodo agazziano* [The Contemporary Meaning of the Agazzi Method], broadcast in two parts in the autumn of 1979 by the channel Rete 2, now known as Rai 2³³. Directed by TV director Sergio Le Donne, with the expert input of Mario Cattaneo³⁴ and Franco Frabboni³⁵, two prominent schol-

³² On the systematic cooperation between these two bodies, see R. Bressanelli, *La nascita del «Museo Pasquali Agazzi» (Mu.P.A.) a Brescia nel 2021*, «Pedagogia e vita», vol. 80, n. 2, 2022, pp. 22-28.

³³ The two 25-minutes episodes were broadcast in October and November 1979, respectively. Listed in the multimedia catalogue «Teche Rai», the documentary *Il significato attuale del metodo agazziano* (henceforth *Isadma*) is not available online but may be viewed at the Rai Archives. It has also been catalogued in the *Banca dati degli audiovisivi sulla scuola e sugli insegnanti* [Database of audiovisual materials on schools and teachers] (Milan, EDUCatt, 2022, Vol. 2) developed by a research team at the Catholic University of Milan (coordinator: Prof. Paolo Alferi), as part of the national research project *School memories between social perception and collective representation. Italy, 1861-2001* (national coordinator: Prof. Roberto Sani). This database may be consulted at www.memoriascolastica.it (last access: 30.07.2024).

³⁴ Mario Cattaneo (1926-2012) was a senior figure at La Scuola publishing house. He was also president of the Brescia Early Childhood Education Centre, an institution founded in 1949 by some of those involved in the leadership of La Scuola with the aims of conducting studies on preschool education and promoting the Agazzi method. This centre played a key role, alongside Brescia City Council, in setting up the «Pasquali-Agazzi» Institute. On behalf of La Scuola, Cattaneo led training courses and conferences for infant school teachers up to the early 1990s. He also headed up several of La Scuola's key publications. When the Italian Federation of Maternal Schools (FISM) was founded in 1974, he became a member of the National Secretariat and took on the role of educational advisor on the professional development of Italian kindergarten teachers. A member of the Christian Democratic Party, Cattaneo served in Brescia as provincial councillor from 1956 to 1960, city councillor from 1960 to 1975, and city councillor with special responsibility for education from 1964 to 1972. For further background, see *Mario Cattaneo. Testimonianze e scritti*, Brescia, Ce.Doc, 2014, as well as his biographical profile in the «Illustrious Citizens» section of the Brescia City Council website: <https://www.comune.brescia.it/aree-tematiche/anagrafe-e-stato-civile/cimiteri/onoranze-al-famedio/cittadini-illustri/mario-cattaneo> (last access: 30-07-2024).

³⁵ An advocate of educational problematicism and champion of democratic education, Franco Frabboni (1935-2024) was a prominent scholar at Bologna's «Alma Mater Studiorum» University. He was actively involved in promoting a new model of education, including early childhood education, which he labelled «a nuovo indirizzo» [of new orientation] based on his interpretation of Bruno Ciari's work. This model envisaged an open and democratic school system

ars of early childhood education, and in collaboration with the teachers of the three Agazzi infant schools in Brescia – «Cesare Abba», «Girolamo Tonini» and «Sorelle Agazzi»³⁶ – the documentary was aired during the program «Educazione e regioni – Infanzia e territorio» [Education and the Regions – Children and Communities]³⁷. This program was created by Rai's Department of School Education (DSE) with a view to presenting «inquiry into teaching and educational issues» that concerned children³⁸. Analysis of «RadiocorriereTV» shows that the program, following its debut with a sequence of episodes entitled *Crescere a Napoli* [Growing up in Naples], initially focused on topics such as the use of dialect, language education, and the lives of children in industrial cities. From late December 1976 through 1977, the program explored various early childhood education experiments then ongoing in Italian cities and suburban areas³⁹. In 1978, it broadened its scope to address the general situation of Italian infant schools, highlighting both their successes and shortcomings⁴⁰.

that would contribute to the civic advancement of the nation. For a comprehensive overview of Frabboni's biographical and cultural journey, see F. Frabboni, *La mia pedagogia. Lungo le valli incantate dell'Educazione* (Pisa, Ets, 2016). Analysis of «RadiocorriereTV», a weekly radio and television listings magazine, suggests that Frabboni was a consultant to the program «Educazione e regioni – Infanzia e territorio» from its inception.

³⁶ This information is contained in the opening and closing credits of the two episodes of the documentary.

³⁷ The program was launched on 6 December 1976, with the subtitle «Infanzia Oggi». Initially curated by Massimiliano Santella, it aired on Mondays and Thursdays from 1:30 p.m. to 2:00 p.m. A few months after its debut, the subtitle was changed to «Infanzia e territorio», and the program, now curated by Mauro Gobbinì, was only broadcast on Mondays.

³⁸ «RadiocorriereTV», n. 44, 26 ottobre-1 novembre 1980, p. 175.

³⁹ The episode titles devoted to this theme included: *Cinisello Balsamo. Gli spazi per l'infanzia* [Cinisello Balsamo: Spaces for Children]; *Scuola materna a Venezia* [Maternal School in Venice]; *Scuola materna in Valle d'Aosta* [Maternal School in Valle d'Aosta]; *Puglia: un'assenza storica* [Puglia: A Historic Vacuum]; *Pomezia ore 7.30: dove vanno i bambini?* [Pomezia at 7.30 am: Where Do the Children Go?]; *Cagliari: una realtà conflittuale* [Cagliari: A Conflict Situation]; *Un bambino a Siena* [A Child in Siena]; *Umbria. Scuola statale o scuola comunale* [Umbria: State School or Municipal School]; and *Umbria. Scuola pubblica e infanzia privata*. [Umbria: Public Schools and Private Childhoods]. During this period, various episodes focused on early childhood education in Emilia-Romagna, a region particularly active in promoting innovative educational projects (examples include: *Ravenna. Da figlio a soggetto sociale* [Ravenna: From Son/Daughter to Social Subject]; *Ravenna. Da genitore a cittadino* [Ravenna: From Parent to Citizen]; *Ravenna: una realtà da comprendere* [Ravenna: A Situation to Be Understood]; and *Emilia Romagna: il pluralismo della scuola dell'infanzia* [Emilia-Romagna: Pluralism at Infant School]). The significant number of episodes centred on Emilia-Romagna may be attributed to the involvement of Bolognese scholar Franco Frabboni as a consultant to the program. For further background on the innovative developments in early childhood education in this region during the 1960s and 1970s, see Catarsi, *L'asilo e la scuola dell'infanzia. Storia della scuola "materna" e dei suoi programmi dall'Ottocento ai giorni nostri*, pp. 241-242, 271-299, 313-318.

⁴⁰ For example, some of the episodes aired included: *Una scuola all'acqua di rose* [A watered-down school]; *Sul sentiero della... scuola materna* [On the path towards... infant school]; *Il gioco nella scuola materna* [Play at infant school]; *Scuola materna da ente morale sociale*

The following year, designated by the United Nations as the «International Year of the Child», its approximately one hundred episodes predominantly examined the condition of children in Italy's most disadvantaged areas and showcased some of the innovative practices being implemented in Italian kindergartens⁴¹.

It was against this backdrop that the documentary *Il significato attuale del metodo agazziano* was broadcast in October-November 1979. The first episode, which aired on Monday October 29, opened with the narrator announcing that he was in Brescia, the city where «in 1895, in a damp old sacristy in Mompiano», the Agazzi's experiment had first been launched. Shots of photographs and documents held at the «Pasquali-Agazzi» Institute helped the viewer to envisage the setting where the Agazzi educational approach first developed. After stating as his initial premise that the Agazzi method had «left a significant legacy to the infant school system», of which it continued to be «one of the pillars», Sergio Le Donne introduced the one theme that could not be overlooked in assessing the contemporary relevance of the Agazzi approach: the infant school's marked social function. According to the presenter, the Agazzi approach could only be fully understood if viewed as «providing a social service», meaning «a service to the child and, through the child, to the family and the community in which the infant school is embedded»⁴². In Le Donne's view, the Agazzi sisters' focus on this aspect – which had become of pressing interest again in the 1960s and 1970s and had been acknowledged as important in the 1969 *Guidelines* – dispelled any question that the Agazzi model might now have become obsolete.

Following this introduction, the episode, divided into three parts, delved into the core principles of the Agazzi method: *The Child and the Environment*, *Practical Life and Manual Work*, and *Expressive Activities*. The footage, filmed by Rai cameramen on location at the three Agazzi-method infant

a ente pubblico [Infant school from a social welfare agency to a public institution]; *Orario di lavoro e scuola materna* [Working hours and infant school].

⁴¹ The topics covered by the program in 1979 included: *Crescere nelle serre calabresi* [Growing up in the Greenhouses of Calabria]; *Grassano: a trent'anni dalla inchiesta sulla miseria* [Grassano: Thirty Years After the Poverty Survey]; *Pavia: programmare lo spazio del fanciullo* [Pavia: Planning Children's Spaces]; and *Matera e la sua scuola dell'infanzia* [Matera and Its Infant Schools]. Additionally, numerous episodes that year focused on developments in the Emilia-Romagna region, underscoring the vibrancy of early childhood education initiatives in that area. One notable example is the episode titled *Romagna la sperimentazione privata* [Romagna: Private Experimentation]. For further details on the topics covered in 1979, cf. M. Bernath, *Dipartimento scuola educazione. I servizi per l'infanzia in Italia*, «RadiocorriereTV», n. 16, 13-19 aprile 1980, p. 157.

⁴² *Isadma*. Without directly quoting her, the director referenced a statement made by Rosa Agazzi in her address to the National Education Congress in Turin in 1898. On that occasion, she described the kindergarten as «an institution which, by aiming to shape the individual, serves the family, schools, and society»: R. Agazzi, P. Pasquali, *Scritti inediti e rari*, M. Grazzini (ed.), Brescia, La Scuola, 1973, pp. 82-83.

schools in Brescia, placed the spotlight firmly on the children and their teachers, who became the main focus of the program. With ongoing commentary by the presenter/director, these recordings vividly illustrated the foundational ideas of the Agazzi approach.

With regard to the first topic, the episode highlighted the social nature of the Agazzi maternal school, characterizing it as «an open school», «a school of comprehensive education», and «open to the family», with a focus on educating «for life through life». While reaffirming that this educational principle had originated with the Agazzi sisters and acknowledging its continued importance, the presenter pointed out that, despite this meaningful legacy, contemporary infant schools, driven by «a fascination with the new», had «all too often [...] forgotten, [...] and shelved their traditions and educational models, starting with those of the Agazzi sisters».

Next, in the second part of the episode, over footage of children building objects with nails, hammers, and pliers, and setting and clearing tables, the narrator explained the concepts of practical life exercises and manual work. The Agazzi method was described as «the full employment method» because it encouraged children to engage in hands-on activities, which are essential for developing basic self-confidence and fostering independence. In Agazzi kindergartens, practical life exercises were seen as either «corrective» of or «complementary» to the educational experience provided in the home⁴³. The presenter noted that the contemporary of these activities was underpinned «by the broader rediscovery of the use of one's hands not only as a tool for creation but also as a medium for thought»⁴⁴.

These explanations, alongside the footage, provided the viewers with a clear understanding of the child's role in the Agazzi style kindergarten. In this setting, the children are active participants in their own learning, gaining knowledge and personal autonomy through direct, concrete, everyday experience and cooperation with their peers rather than via prepackaged information conveyed by their teacher. Of particular note, during the footage of children performing household chores, it was emphasized that there were no «distinctions between boys and girls» in the assignment of these tasks. On the contrary, the presenter commented that engaging boys in activities tradition-

⁴³ The presenter added: «In general, and especially today, children receive little encouragement to be active in the home and many tasks are done for them. It is commonly believed that gratifying children requires shielding them from the effort and encounter with reality that practical life exercises both offer and impose. As a result, children often start school unable to manage even simple tasks and resistant to new challenges. In contrast, when children are trained to handle practical, concrete tasks on their own, they grow in independence and become more engaged with reality»: *Isadma*.

⁴⁴ *Ibid.* Suffice it to recall here that the 1969 *Guidelines* emphasized the close link between «Constructive and Practical Life Activities» and «Intellectual Education», cf. Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, cit., pp. 266 ss.

ally viewed in the home as «typically female» could help to break down deeply ingrained «mindset barriers». According to Sergio Le Donne, illustrating that «certain models are not inherent in nature but rather are rooted in culture and tradition», represented a valuable «contribution to sexual education»⁴⁵.

This comment was clearly intended to affirm the contemporary relevance of the Agazzi educational approach, and specifically in relation to the theme of sex education, which was a major focus in the political and cultural debates of the time, fuelled by the feminist movements of the 1970s. During this period, sexual education was a prominent topic of discussion in education and school-related circles. For instance, the 1969 *Guidelines* emphasized the need to introduce «a basic form of sexual education» starting from infant school, and «to implement it in non-repressive ways»⁴⁶.

The third part of the documentary – entitled *Expressive Activities* – emphasized the Agazzis' belief in play as the primary means through which children learn and express themselves. This segment showcased footage of children who were busy drawing, scribbling, painting, or moving coloured pencils to the rhythm of music, either standing at easels or lying on the floor. The presenter explained that, in the Agazzi approach, play activities were viewed as «true languages» which children use to learn about their surroundings. Play also fulfilled a «liberatory» function, by allowing children to express their emotions. It was noted that the importance the Agazzi method placed on expressive activities had sometimes been leveraged to discredit the approach⁴⁷. However, such criticisms were unfounded, as confirmed by the 1969 *Guidelines*, which emphasized that play, described as «a key manifestation of childhood», should be a central feature of all activities offered to children⁴⁸.

Building on the final theme of the first episode, the second episode, aired on Monday, 05 November 1979, focused on symbolic languages. Although the presenter acknowledged that the Agazzi method did not provide a «complete answer» in this regard, he believed that it nevertheless offered «valuable pointers and clues». Specifically, the Agazzi method took an «extremely interesting» approach to the use of symbolic languages by valuing «spoken language» and recognizing «the absolute need to move beyond the child's spontaneous, immediate, concrete, everyday language». The footage illustrated activities designed to translate the Agazzis' insights into practice. The sisters' approach was based on the belief that «by starting with the children's 'spoken' language and the

⁴⁵ *Isadma*.

⁴⁶ Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, cit., p. 262.

⁴⁷ Sergio Le Donne explained that some scholars believed laying too much emphasis on expressive activities was «a deadly trap at the educational level» because, in elementary schools, these activities were often undervalued and somewhat marginalized. Reflecting on these practices, the presenter also touched on singing, an activity that was highly valued by the Agazzis but also controversial at the time the documentary was produced, cf. *Isadma*.

⁴⁸ Lombardi, *I programmi della scuola per l'infanzia in Italia dal 1914 al 1969*, cit., p. 263.

‘spoken’ language of the neighbourhood as a basis for playing with words and sentences, it was possible to devise a playful exercise book» that would serve as a highly effective language teaching tool⁴⁹. This episode also touched on the use of «contrassegni» [labels]⁵⁰, the well-known device invented by the Agazzi sisters to promote the development of symbolic language, which was also recommended by the 1969 *Guidelines*⁵¹. Interestingly, when reflecting on the Agazzi method’s emphasis on language learning, Sergio Le Donne compared it to the pedagogical model of Don Lorenzo Milani. He quoted Milani’s famous statement that «a child who knows “a thousand” words is linguistically (and not only linguistically) stronger than a child who knows “a hundred” words»⁵².

Having explored the educational principles underpinning the Agazzi sisters’ teachings, the broadcast then focused on a theme that was key to addressing doubts about the validity and contemporary relevance of their insights. According to Le Donne, one of the main reasons the Agazzi method continued to receive considerable support and remained the focus of ongoing study and experimentation over 80 years after its founding, was the fact that it was an «anti-method». He explained that the term «method» describes «a rigid educational system that purports to be exhaustive, in the sense of solving all the challenges of education» and that remains unaffected by the «ravages of time», thus claiming «to be perpetually valid», a definition that did not fit the Agazzi model. The greatest merit of the Agazzi approach was its grounding in the «maximum transparency to time, that is, maximum permeability to time itself, to history». To further illustrate this characteristic of the method and defend it from accusations of obsolescence and old-fashionedness, Sergio Le Donne added:

The Agazzi model or structure is a set of ideas, of broad educational ideas, based on which it is possible to construct different educational trajectories, which are clearly left and entrusted to the school. And which the school can negotiate, adapt, and recycle according to the specific challenges and needs of the local community setting. So, it is an anti-

⁴⁹ *Isadma*. In one scene, for example, a child explains to a classmate what he is drawing as he continues to work. In another, during a puppet show on the theme of toothache, the teachers encourage the children to interact with the puppets by asking questions and sharing their own experiences of going to the dentist.

⁵⁰ As footage of the «old labels» held at the «Pasquali-Agazzi» Institute is shown, the narrator comments that as components «of the children’s identity and of the organization of their personal and community lives», these labels help to «strike a balance between the individuality and the socialization of the child»: *Isadma*.

⁵¹ Lombardi, *I programmi della scuola per l’infanzia in Italia dal 1914 al 1969*, cit., p. 275.

⁵² *Isadma*. As is well known, the prior of Barbiana identified proficiency in both written and spoken language as key to both personal development and social emancipation, especially among the poorest classes. There is an extensive literature on Don Milani’s pedagogy of the word. For further background, see R. Sani, D. Simeone (edd.), *Don Lorenzo Milani e la scuola della parola. Analisi storica e prospettive pedagogiche*, Macerata, eum, 2011.

method. This is its key strength: it acts as a sort of necklace of educational ideas that each school can wear on itself and refine based on its unique geographical location and historical context⁵³.

The second episode closed with some remarks on the training of Agazzi maternal school teachers. As the camera showed a teacher sitting on the floor, playing and talking with the children – projecting an image of a creative, industrious, and non-authoritarian educator who listens patiently and fosters dialogue and cooperation – the presenter emphasized the need to have «extremely robust professional competence» to implement this kind of teaching-learning model. He explained that the Agazzi approach, which was rooted in everyday life and the realities of the moment, demanded an educator who was «even more competent» than others. Recognizing the importance of this aspect, he expressed the hope that «those responsible for infant schools – whether state, municipal, or private – [would] increasingly commit to systematic and rigorous professional development for their staff»⁵⁴.

4. Rai and the Agazzi maternal school model

While up until the 1970s, as outlined above, studies on the Agazzi approach were largely the preserve of a small professional circle – academics, scholars of preschool education, and infant school teachers – and reported in the specialized literature and at sector-specific conferences, the documentary *Il significato attuale del metodo agazziano* marked a sea change in this regard. The TV program, which closely aligned itself with the lines of inquiry pursued by the «Pasquali-Agazzi» Institute from the mid-1970s, sought to reinterpret the Agazzi tradition in light of contemporary educational challenges. From a communications perspective, however, it was addressed to a broader public than before. Leveraging the reach of the mass media, the documentary – directed by a non-expert, but informed by sound advice from education specialists – was aimed at engaging a far larger and more diverse audience than previously targeted by the specialist literature⁵⁵.

Analysis of the journal «*Infanzia*»⁵⁶ reveals that Frabboni himself – who,

⁵³ *Isadma*.

⁵⁴ *Ibid.*

⁵⁵ It should be noted that, about a year after the documentary *Il significato attuale del metodo agazziano* was broadcast on Rai, it was also screened during the earlier-mentioned seminar *L'oggi del metodo Agazzi*, see Rosa Agazzi: *un metodo, una vita*: «La Voce del Popolo», 16 gennaio 1981.

⁵⁶ Founded in October 1973 by the educationalist Piero Bertolini (1931-2006) and initially printed by La Nuova Italia in Florence with the subtitle *Orientamenti esperienze indagini sui problemi pedagogico-didattici e sulla gestione della scuola materna e asili nido* [*Guidelines*,

as earlier mentioned along with Cattaneo, had advised presenter and director Sergio Le Donne – emphasized how uniquely the Agazzi method was portrayed in the documentary. In the same weeks that the program was airing on national television, the Bologna-based scholar transcribed and commented on the documentary's script in an article entitled *Quando il commento TV ha il sapore del linguaggio pedagogico. Zoomata televisiva sul metodo Agazzi* [When TV Commentary Has the Flavour of Pedagogical Language: A Television Zoom-In on the Agazzi Method]⁵⁷. In the introductory notes to this article, Frabboni praised the documentary, noting that its primary strength lay in the fact that it had not been produced by an insider. This, he argued, enabled a meaningful dialogue between science and experience, moving beyond an era when these disciplines, functioning as «separate entities», «*blossomed and withered within individual, well-guarded, fenced-off gardens*, which could only be accessed by their respective experts», thus perpetuating the «fragmentation and division of knowledge».

Frabboni acknowledged that early childhood education institutions, compared to schools at the other levels of education, displayed particularly «*strong receptivity and openness to interdisciplinary contributions*». However, he cautioned that this openness should not encourage the misconception that pre-schools were a «no man's land, a pedagogical city 'open' to all 'external' intrusions and influences». To prevent this, he stressed that infant schools should continue to «*resolutely, tooth and nail, defend both their historical heritage (the educational models that had constituted their original launch pad, such as those of Froebel, Owen, the Agazzis, and Montessori) and their experimental heritage*», which they had been «*patiently designing and implementing*» since the mid-1960s. Frabboni concluded his introduction by commending the documentary for using a television language «*imbued with a distinctly pedagogical essence*» to sketch a «*clearly presented*», «*conceptually rigorous*» and «*critically precise*» 1980s «*portrait*» of the Agazzi method, proving that even a «*non-expert [could] do Pedagogy*»⁵⁸. Frabboni thus focused on the film's

projects, and research into educational issues and the management of infant schools and day-care centres], the journal initially drew on the collaboration of the research centre «Centro Studi Bruno Ciari». Frabboni was co-editor of the journal for almost fifty years, namely, from 1976 up to his death earlier in 2024. As Bertolini wrote in the inaugural issue of «*Infanzia*», the periodical was founded with view to leading a «battle» in the field of preschool education, to becoming «the voice of all the forces interested in an alternative educational discourse, a hub for catalysing, propelling, and connecting all those who [...], mostly in isolation from one another» were working in this direction, cf. P. Bertolini, *Presentazione*, «*Infanzia*», n. 1, ottobre 1973, pp. 3-4, citation on p. 4.

⁵⁷ Effe effe [F. Frabboni], *Quando il commento TV ha il sapore del linguaggio pedagogico. Zoomata televisiva sul metodo Agazzi*, *ibid.*, n. 37, [ottobre-novembre] 1979, pp. 11-15. Although some passages were edited, Frabboni did not make any major changes to the director's commentary.

⁵⁸ *Ibid.*, p. 11 (italics in the original).

communicative power, noting that it did not present the Agazzi approach for celebratory or eulogistic purposes, but rather to underscore the method's contemporary relevance and vibrancy.

Like other audiovisual sources, this film influenced viewers' «knowledge of the past», but also their «understanding of the present»⁵⁹, effectively bridging the gap in time and reorganizing the audience's memories⁶⁰. When examined «not merely as a direct testimony to the past of schooling but also as a media-driven and, therefore, social reconstruction of it»⁶¹, the documentary on the Agazzi method offers valuable insights into school memory⁶² defined as the «collective [...] practice of remembrance of a common school past»⁶³.

The two episodes of the program «Educazione e regioni – Infanzia e territorio» devoted to the Agazzi method allow us to infer «the representation of the school and the teaching offered by [...] the word of information and communication»⁶⁴: in this case, the specific image of how «schooling was done» in Agazzi-inspired kindergartens. An image that had been revisited vis-à-vis the past and was now being transferred into, and reinforced within, the collective memories of Italians. The director's narrative commentary and the

⁵⁹ P. Sorlin, *L'immagine e l'evento. L'uso storico delle fonti audiovisive*, Torino, Paravia, 1999, p. 27.

⁶⁰ On the heuristic potential of television documentaries in the context of school history studies, see P. Warmington, A. Van Gorp, I. Grosvenor, *Education in motion: use of documentary film in educational research*, «Paedagogica historica», vol. 4, 2011, pp. 457-472. For a broader discussion on developments in studies concerning the relationship between television and history, see P. Ortoleva, *Testimone infallibile, macchina dei sogni: il film e il programma televisivo come fonte storica*, in G. Miro Gori (ed.), *La storia al cinema. Ricostruzione del passato/interpretazione del presente*, Roma, Bulzoni, 1994, pp. 299-331 and S. Carini, *Media e storia: cronologia di un dibattito*, in A. Grasso (ed.), *Fare storia con la televisione. L'immagine come fonte, evento, memoria*, Milano, Vita & Pensiero, 2006, pp. 47-90.

⁶¹ P. Alfieri *Introduzione*, in Id. (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, Roma, Armando, 2019, p. 13.

⁶² On this interpretive category, see – among others – A. Vinao Frago, *La memoria escolar: restos y huellas, recuerdos y olvidos*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 12, 2005, pp. 19-33; Id., *Memoria, patrimonio y educación*, «Educatio Siglo XXI», n. 2, 2010, pp. 17-42; C. Yanes-Cabrera, J. Meda, A. Viñao (edd.), *School Memories. New Trends in the History of Education*, Cham, Springer, 2017.

⁶³ J. Meda, A. Viñao, *School memory. Historiographical balance and heuristic perspectives*, *ibid.*, p. 2. This essay outlines the three perspectives from which school memories may be investigated, namely «as an individual, collective and/or public practice» of recalling a common school past, *ibid.*

⁶⁴ *Ibid.*, pp. 2-3. Juri Meda specifies that «collective memory genetically descends from the collective imaginary, whose symbolic materials can either derive from the cultural heritage of a given community or be integrated and redefined by the culture or information industry»: J. Meda, *Memoria Magistra. La memoria della scuola tra rappresentazione collettiva e uso pubblico del passato*, in G. Zago, S. Polenghi, L. Agostinetto (edd.), *Memoria ed Educazione. Identità, Narrazione, Diversità. Atti del Convegno nazionale Siped, Padova 30 giugno-1° luglio 2020*, Lecce-Brescia, Pensa Multimedia, 2020, p. 29. On the collective school memories nurtured by Italian television, see Alfieri (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, cit.

footage captured by Rai cameras at the «Cesare Abba», «Girolamo Tonini», and «Sorelle Agazzi» infant schools combined to reveal a novel educational approach that was rich in pedagogical and social meaning. The portrayed approach offered a dynamic yet peaceful learning environment that balanced order with freedom, fostering democratic collaboration between preschool institutions, families, and the community. This school system was presented as acknowledging children's complex nature, emphasizing cooperation and mutual assistance, interpreting play as a source of creative and active energy and viewing the environment as the first early learning resource. The documentary showed that while the Agazzi approach did not disregard symbolic communication, it prioritized tangible experiences over theoretical ideas, preferring «spontaneous, immediate, concrete, everyday language» to «logical languages», [...] logical-formal, mathematical languages»⁶⁵.

The television documentary *Il significato attuale del metodo agazziano* was created to stimulate reflection on the pedagogical, social, and ethical implications of the Agazzis' peculiar educational model. Its aim was to convince viewers that this approach to early childhood education remained salient to the educational needs of late 1970s society. Without viewership data for the program, it is impossible to determine the actual impact on the collective memory of Italians of this first and only attempt at revisiting this segment of shared educational history for presentation to a television audience⁶⁶. Considering that it was broadcast on weekdays in the early afternoon, it is reasonable to assume that the documentary did not lead to a large-scale reconstruction of memory.

In subsequent years, neither public nor private Italian television channels produced any further programs devoted to this specific chapter of history. Although the Agazzi sisters and Pasquali left an indelible mark on the history of early childhood education in Italy and beyond, their approach fared differently compared to that of Maria Montessori, for example. Indeed, in 2007, the private Italian television network Mediaset broadcast a primetime TV movie on

⁶⁵ *Isadma*.

⁶⁶ Consultation of the Rai Archives and «RadiocorriereTV» reveals that no other television programs exclusively devoted to the Agazzi method were aired before or after 1979. However, examination of the TV listings magazine shows that in January 1979 – about ten months before Sergio Le Donne's documentary aired – a brief feature on the Agazzi method was shown on «Trecei. Genitori ma come», a program produced by DSE, curated by Sandro Lai, Franco Matteucci, and Massimiliano Santella, and broadcast on Rai 2 on Thursdays from 1:30 to 2:00 p.m. More specifically, on 4 January 1979, Graziano Cavallini, a professor at the University of Sassari, who had been tasked with illustrating «the pedagogy of the past» (*Per scoprire i bambini*, «RadiocorriereTV», n. 10, 4-10 marzo 1979, p. 111) presented a five-minute *Scheda pedagogica* [Educational Profile] of the Agazzi method. Cavallini's feature, entitled *Scheda pedagogica: Rosa e Carolina Agazzi*, offered a quick outline of the educational objectives of the Agazzi approach. Although the feature is listed in the multimedia catalogue «Rai Teche», it is not available for viewing online but may be consulted at the Rai Archives.

Montessori's work, *Maria Montessori. Una vita per i bambini* [*Maria Montessori. A life devoted to children*], which proved extremely popular with the public⁶⁷.

⁶⁷ The TV movie about Montessori, broadcast in two parts (on 28 and 30 May) on Canale 5, garnered one of the highest audience ratings of 2007. For an in-depth account of this docufilm and to explore the memory held of Montessori internationally, cf. S. Polenghi, «*Maria Montessori. Una vita per i bambini*»: a biopic that blends memory, interpretation and reality, in J. Meda, L. Paciaroni, R. Sani (edd.), *The school and its many pasts*, Macerata, eum, 2024, pp. 721-731.

The articulation of formal, informal, and non-formal education in Piracicaba-Brazil (1880-1910)

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ABSTRACT: In the late 19th and early 20th centuries, there were social, political, cultural, and educational transformations in Brazil due to the end of the Empire and the beginning of the Republic. In Piracicaba, state of São Paulo, formal, non-formal, and informal education developed in an intertwined and unique way, with the participation of different sectors of society, in constructing and consolidating the republican regime and a local identity. This article reveals some agents and institutions involved in this process and parallels at the national and international levels. The research is based on the Pedagogical Municipality historiographical category, which helps us develop a meta-history, with a *mezo* approach, using national, regional, and local sources in dialogue with national and international literature.

EET/TEE KEYWORDS: History of Education; Formal and non formal education; Brazil; XIX-XX Centuries.

Introduction

This article presents aspects that influenced the educational development of Piracicaba, a Brazilian municipality in the interior of the state of São Paulo, to identify how different types of education were intertwined in specific and general actions, in the historical political moment marked by the transition from

the Empire to the Republic. Thus, the objective is to identify the agents and institutions involved in articulating formal, informal, and non-formal education in Piracicaba, from 1880 to 1910. The justification for researching Piracicaba specifically is that, at the end of the first decade of the 1900s, this municipality stood out in the state scenario of São Paulo due to the number of educational institutions¹. However, there were no precise indications in the sources of how this movement of educational expansion occurred or when it began. This led us to the decision to delimit the time frame between 1880 and 1910, in order to investigate whether this situation was linked to issues related to the advent of the Brazilian Republic, or whether it arose from the Imperial period.

This research² is based on the principle that the educational potential of municipalities is directly related to the articulation between individuals and cultural, political, and economic aspects. To explore this issue, the Pedagogical Municipality historiographical category was used as a theoretical-methodological reference. This category proposes, through metahistory, to treat the municipality as a unit of observation, a product of fragments of record, measurement, and factorization, «with a diachronic and integrative view of a total history»³, while also considering the general and regional plan. The aim was to identify whether there is an educational intentionality that brings with it a political-pedagogical project, to spread among citizens the habit of actively and daily participating in educational actions⁴.

To complement the analyses, we used the category of types of education,

¹ Evidence that Piracicaba stood out in the context of the state of São Paulo can be found in the São Paulo State Education Yearbooks – São Paulo (State), *São Paulo State Education Yearbook (1907-1908)*, São Paulo, Typ. Augusto Siqueira & C, 1908; São Paulo (State), *São Paulo State Education Yearbook (1908-1909)*, São Paulo, Typ. Siqueira, Salles & C, 1909; São Paulo (State), *São Paulo State Education Yearbook (1909-1910)*, São Paulo, Typography of the Official Gazette, 1910; São Paulo (State), *São Paulo State Education Yearbook (1910-1911)*, São Paulo, Typography of the Official Gazette, 1911. As well as in the research of historian M.T.G. Percin, *A Síntese Urbana*, Piracicaba, Equilíbrio & Instituto Histórico e Geográfico de Piracicaba – IHGP, 2009, and the pages of the newspaper *Gazeta de Piracicaba, 1882-1911 – editions 1 to 5289*, Piracicaba, Collection of the Historical and Geographical Institute of Piracicaba – IHGP.

² The research production is in the context of the Project *Constitutive actions for the development of formal, informal and non-formal education in the municipalities of Piracicaba/SP (1880-1910) and Londrina/PR (1930-1990)* – started in 2023 with funding from National Council for Scientific and Technological Development – CNPq and Araucaria Foundation/SETI; and the Project *The municipality's action in educational modernization: Piracicaba at the beginning of the first republic (1890-1910)* – started in 2022 with funding from National Council for Scientific and Technological Development – CNPq.

³ For further information on Pedagogical Municipality see J.P. Magalhães, Á. Adão, *Os municípios na modernização educativa*, Lisboa, Instituto de Educação da Universidade de Lisboa, 2014 – Coleção Estudos e Ensaio, p. 6, <www.ie.ulisboa.pt> (last access: 09.07.2023).

⁴ Still on the subject of Pedagogical Municipality, see W. Gonçalves Neto, *Repensando a História da Educação Brasileira na Primeira República: o município pedagógico como categoria de análise*, in W. Gonçalves Neto, C.H. Carvalho (edd.), *Ação municipal e educação na Primeira República no Brasil*, Belo Horizonte, Edições Mazza, 2015, pp. 19-35.

which encompasses formal, informal, and non-formal education⁵. Formal education is understood as a process of teaching and learning at school, which aims to expand students' potential, generally following the purposes and syllabus imposed by the education systems. Non-formal education consists of actions with pedagogical but non-school intentions, and informal education comes from everyday situations and experiences, arising from other human relationships. At the municipal level, the challenge for local governments is to implement pedagogically planned actions, by interweaving the content of formal education subjects with various informal and non-formal opportunities.

Given this context, the text discusses how formal, non-formal, and informal education was organized in Brazil, specifically in the province/state of São Paulo, and the municipality of Piracicaba, between 1880 and 1910. It then presents the most outstanding situations in Piracicaba, in which these three types of education were articulated. The role of the press, associations, and various entities, including schools, in promoting public events to propagate republican ideals and the importance of education in this movement is highlighted. There is a direct correlation between informal and formal education, and the text also demonstrates how efforts to change mindsets affected the balance between formal education, at school and home, and non-formal education, in private lessons. Throughout the text, we aimed to draw parallels with similar experiences and actions that occurred in other nations.

1. *Overview of education in Brazil, province/state of São Paulo and Piracicaba*

Regarding how formal, non-formal, and informal education occurred in Brazil, São Paulo, and Piracicaba, during the end of the Empire period and the beginning of the Republic, we analyzed the legislation in force, literature on the topic, documents from public and private collections and research in the main journals in the area of History of Education in the country—«Cadernos de História da Educação», «Revista Brasileira de História da Educação», «Re-

⁵ These three types of education will be treated mainly from the perspective of the following authors: M.G. Gohn, *Educação não-formal, participação da sociedade civil e estruturas colegiadas nas escolas*, «Revista Ensaio: Avaliação de Políticas Públicas Educacionais [online]», vol. 14, n. 50, 2006, pp. 27-38, <<http://www.scielo.br/pdf/ensaio/v14n50/30405.pdf>> (last access: 25.07.2023); R. Canário, *A Escola tem Futuro? Das Promessas às Incertezas*, Artmed, 2006; and M. Johnson, D. Majewska, *Formal, non-formal, and informal learning: What are they, and how can we research them?*, Cambridge, Cambridge University Press & Assessment Research Report, 2022, <<https://www.cambridgeassessment.org.uk/Images/665425-formal-non-formal-and-informal-learning-what-are-they-and-how-can-we-research-them-.pdf>> (last access: 29.09.2023).

vista História da Educação» and «Revista HISTEDBR». In the specific case of Piracicaba, the newspaper *Gazeta de Piracicaba* was also used.

The research revealed that formal education, among the three types of education, has received predominant attention from researchers in the History of Education, both nationally and internationally. Formal education can be understood conceptually as an educational structure with a methodical character, marked by specific teaching and learning procedures, planned by norms and laws. One of its most common forms is the school institution, which from the end of the 18th century onwards began to play a fundamental role in the urban and industrial European «unity of the modern nation-state»⁶. The relationship between formal education and the formation of States, in Europe, East Asia, and the United States of America, exposes that the origin of the development of educational systems in the 19th and 20th centuries varied according to local particularities, but they have in common the ideal of building a collective mentality of nationality, which is why it was eventually adopted by all social classes. «Learning became irreversibly equated with formal, systematic schooling, and schooling itself became a fundamental feature of the state»⁷.

In Brazil, during the period covered here, formal education took place in a variety of settings, such as public and private schools, tutoring schemes, and asylums. A very common form, especially during the Empire, was domestic education, which took place through preceptors or tutors⁸. All these types of formal education, at the end of the Empire, were regulated by legislation and were structured as follows:

At the dawn of the Republic, the state of education was as follows: primary and secondary education in the Neutral Municipality and higher education throughout the country under the responsibility of the central government and managed by the Minister of the Empire; primary, normal and professional education under the jurisdiction of local powers, legislated by the Provincial Assemblies and administered by the General Inspectorates⁹.

At the Imperial level, Decree 1,331-A of February 17, 1854, known as the *Couto Ferraz Reform*, was in force and regulated the reform of primary and secondary education in the municipality of Corte, the economic and political

⁶ R. Canário, *A Escola tem Futuro? Das Promessas às Incertezas*, Artmed, 2006, p. 96.

⁷ A. Green, *Education and State Formation. Europe, East Asia, and the USA*, 2nd ed., Houndmills, Basingstock, Hampshire, New York, Palgrave Macmillan, 2013, p. 11, <https://www.researchgate.net/publication/263917935_Education_and_State_Formation_Europe_East_Asia_and_the_USA> (last access: 20.09.2023).

⁸ About home education see M.C.C. Vasconcelos, *A casa e seus mestres: a educação no Brasil de oitocentos*, Rio de Janeiro, Gryphus, 2005.

⁹ C. Monarcha, *A instrução pública nas vozes dos portadores de futuros (Brasil-séculos XIX and XX)*, Uberlândia, EDUFU, 2016 – Coleção História, Pensamento, Educação, Série novas investigações, Vol. 8, p. 123.

center of the Brazilian Empire since the mid-18th century, currently in Rio de Janeiro. It defined several rules for public and private educational institutions, as well as home education, such as subjects to be taught, supervision, and obligations of parents or guardians and the government¹⁰. In the late 1870s, the *Leôncio de Carvalho Reform* – Decree 7, 247 of April 19, 1879 – was the last educational measure devised by the Brazilian Empire. It defended the same principles as the *Couto Ferraz Reform* and attempted to implement proposals that had not yet achieved success, by giving special attention to education in the provinces¹¹.

The Proclamation of the Republic in 1889 brought ideals that placed in education the hope of enabling the establishment of a constitutional and representative regime, supported by liberal economic and social precepts, and the industrialization and urbanization of cities. However, despite much enthusiasm, at its beginning, the Republic did not significantly alter the educational structure inherited from the Empire¹².

The main actions at the national level resulted from a reform in the Federal District, the capital of the Republic, with Decree 981, of November 8, 1890, which was considered an educational renewal, by determining the «systematic examinations, including public examinations with the presence of examining boards, established strict control over enrollment and attendance procedures and over the time allocated to schoolwork»¹³. The *Epitácio Pessoa Code* – Decree 3,890, of January 1, 1901 – a reform in secondary education that changed the syllabus of this stage of education, by equating private and state institutions with the Imperial High School Pedro II, located in Rio de Janeiro, in an effort to standardize national secondary education. High School Pedro II educated the children of the country's economic and political elite, with a secondary education that guaranteed a Bachelor's degree in Languages¹⁴.

Since the government, both in the Empire and in the Republic, did not define how primary, normal, and professional education should be governed by

¹⁰ To learn more about this decree, see *Decree 1,331-A of February 17, 1854*, <<https://www2.camara.leg.br/legin/fed/decret/1824-1899/decreto-1331-a-17-fevereiro-1854-590146-publicacaooriginal-115292-pe.html>> (last access: 23.08.2019).

¹¹ D. Saviani, *O legado educacional do longo século XX brasileiro*, in Id. (ed.), *O legado educacional do século XX no Brasil*, Campinas, Autores Associados, 2004, pp. 9-57.

¹² To better understand the relationship between education and politics in Brazil at this historical moment, see W. Gonçalves Neto, *Repensando a história da educação brasileira na Primeira República: o município pedagógico como categoria de análise*, in J.C. Lombardi (ed.), *Navegando na História da Educação Brasileira*, Campinas, Faculdade de Educação-UNICAMP, 2006, CD-ROM, n.p.

¹³ R.F. Souza, *Templos de civilização: a implantação da escola primária graduada no Estado de São Paulo (1890-1910)*, São Paulo, UNESP, 1998, p. 59.

¹⁴ To learn more about Brazilian legislation during this period, consult J.C. Palma Filho, *A República e a educação no Brasil: Primeira República (1889-1930)*, 3rd ed., São Paulo, PROGRAD, UNESP, Santa Clara Editora, 2005.

the provinces/states, many of them used as a model the Decrees cited above, which guided education in the municipality of the Court and, later, in the Federal Capital. In the case of São Paulo, in the 1880s, the province spent almost the entire decade discussing an educational reform, which resulted in Law 81, of April 6, 1887, which followed the precepts of the *Leôncio de Carvalho Reform*¹⁵.

However, after the Proclamation of the Republic, the state enacted a series of laws and decrees, the most important of which was Law 88 of September 8, 1892, which introduced changes and innovations that produced a new school culture, including repercussions for society in general, by symbolizing important aspects for the promotion of the inculcation of republican precepts. Based on this law and the decrees that regulated it, an educational administrative structure was designed, making schooling compulsory, whether in educational institutions or at home, creating different types of state schools for diverse target audiences, and establishing a complex organization, together with the municipalities, for supervision. São Paulo, together with the Federal District, were the first entities of the Republic to implement educational reforms, which would later serve as an example for the other states of the federation¹⁶.

In Piracicaba, data on formal education were taken from documents in the Municipal Public Archives – *Minute Books* (1880-1911), *Book of Official Documents* (1890-1910), *Law and Resolution Books* (1892-1910) and *the Municipal Schools Registration Book* (1905-1929) –, from the *São Paulo State Education Yearbooks* (1907-1911) and the «Gazeta de Piracicaba» (1882-1910) newspaper¹⁷. State and municipal public educational institutions were identified, as well as private educational institutions – confessional, non-con-

¹⁵ On educational policies in the state of São Paulo at the end of the imperial period see M.J. Warde, M.A.R. Paulo, *A instalação do serviço de inspeção escolar na província de São Paulo (1835-1887)*, «Cadernos de História da Educação», vol. 12, n. 1, jan./jun. 2013, pp. 253-275, <<http://www.seer.ufu.br/index.php/che/article/view/22908/12434>> (last access: 20.08.2018).

¹⁶ About the educational policies of the state of São Paulo at the beginning of the Republic, see C. Monarcha, *A instrução pública nas vozes dos portadores de futuros (Brasil-séculos XIX e XX)*, Uberlândia, EDUFU, 2016 – Coleção História, Pensamento, Educação, Série novas investigações, vol. 8. As well as R.F. Souza, *Templos de civilização: a implantação da escola primária graduada no Estado de São Paulo (1890-1910)*, São Paulo, UNESP, 1998.

¹⁷ Piracicaba City Council, *Minute Books (1880-1911)*, Municipal Public Archives of Piracicaba; Piracicaba City Council, *Book of Official Documents (1890-1910)*, Municipal Public Archives of Piracicaba; Piracicaba City Council, *Law and Resolution Books (1892-1910)*, Municipal Public Archives of Piracicaba; Piracicaba City Council, *Municipal Schools Registration Book (1905-1929)*, Municipal Public Archives of Piracicaba; São Paulo State Education Yearbooks – São Paulo (State), *São Paulo State Education Yearbook (1907-1908)*, São Paulo, Typ. Augusto Siqueira & C, 1908; São Paulo (State), *São Paulo State Education Yearbook (1908-1909)*, São Paulo, Typ. Siqueira, Salles & C, 1909; São Paulo (State), *São Paulo State Education Yearbook (1909-1910)*, São Paulo, Typography of the Official Gazette, 1910; São Paulo (State), *São Paulo State Education Yearbook (1910-1911)*, São Paulo, Typography of the Official Gazette, 1911; *Gazeta de Piracicaba, 1882-1911 – editions n. 1 to 5289*, Piracicaba, Collection of the Historical and Geographical Institute of Piracicaba – IHGP.

fessional and charitable. These educational institutions were governed by state legislation, except municipal institutions, which had their own guidelines.

About home education, practiced by preceptors or tutors, this practice was used over the centuries, mainly in ancient Greece and Rome, for the education of boys. This practice was transformed and from the Middle Ages onwards it spread throughout Europe, when tutors began to teach not only scientific subjects but also notions of civility and good manners, in addition to starting to serve the female sex. In the 17th century, especially in France and England, this custom left the castles and also became part of the education of the children of the aristocracy and wealthy merchants. This practice only fell into disuse with the creation of modern States and the establishment of public education systems, from the second half of the 19th century. At the end of the 19th century and beginning of the 20th century, in countries of Central, Southern, and Eastern Europe, and Russia, the close relationship the tutor, living in the house or castle, had with the children and parents, meant that there was, in addition to the aspects of formal education, an education that can be considered informal, since the tutor brought with him/her civilizing values considered modern¹⁸.

There are limitations in the official documentation about homeschooling in Brazil, as there was no provision in the imperial/national and provincial/state legislation for a registry or statistics on this subject. The only obligation of parents and guardians was to present their children to take end-of-year exams at some public educational institution. Thus, the only historical source found on this subject was advertisements in periodicals, usually in the local press¹⁹. Likewise, there is evidence about homeschooling in Piracicaba only in the press, in this case, the «Gazeta de Piracicaba». Advertisements were found from men and women, Brazilians, and foreigners. Some indicated they had teaching training, others offered themselves in the same advertisement to be foremen, clerks, and homeopathic doctors. Most intended to live in the residence of the family that would hire them, and the offer was for both urban and rural areas.

With respect to non-formal education, research into legislation, literature, and national and international journals in the field did not reveal any inves-

¹⁸ On the topic of home education, check out the research by L. Szuba, *Tutor and tutoring in the history of education (to the Great French Revolution)*, «21st Century Pedagogy», vol. I, n. IV, 2020, pp. 49-59, <<https://intapi.sciendo.com/pdf/10.2478/ped21-2020-0008>> (last access: 27.10.2023); and M. Rébay, *Aristocracy and education in Europe from the late 18th to the 20th centuries*, «Hungarian Educational Research Journal», vol. 14, n. 1, 2024, pp. 1-6, <<https://akjournals.com/view/journals/063/14/1/article-p1.xml>> (last access: 23.01.2024).

¹⁹ This is evidenced in research by J.J.T. Anjos, *História da educação da criança pela família no século 19: fontes para uma escrita*, «Hist. Educ. (Online)», vol. 19, n. 45, jan./apr., 2015, pp. 67-83, <https://seer.ufrgs.br/index.php/asphe/article/view/43619/pdf_57> (last access: 20.07.2023); and in investigations by M.C.C. Vasconcelos, *Preceptoras estrangeiras para educar meninas nas casas brasileiras do século XIX*, «Cadernos de História da Educação», vol. 17, n. 2, may/aug. 2018, pp. 285-308, <<https://seer.ufu.br/index.php/che/article/view/43282/22588>> (last access: 18.07.2023).

tigations that addressed this topic during this historical period. This type of education is characterized by not being systematized and not having a permanently organized process; learning is based on the intentionality of each educational action, which varies according to the needs of the group or individual for whom it is intended. Regarding the physical space where learning takes place, it can be in any location that has the minimum infrastructure appropriate to the specific theme of each action.

Nothing was identified in Brazilian imperial/federal legislation and the state legislation of São Paulo regarding non-formal education. In Piracicaba, a series of advertisements for private lessons were found in the «Gazeta de Piracicaba» newspaper (1882-1910). These lessons were given by both educators and liberal professionals and covered topics such as school subjects at different levels of education—primary, secondary, preparatory, and teacher training—, music, drawing, accounting, and foreign languages. The places where the lessons were offered varied between the teacher's home and the student's home, and there were even lessons given in a hotel in the city.

Informal education has long been neglected by academia and international researchers, who focus their research predominantly on formal or institutionalized education. Nonetheless, it is necessary to address the role of informal education in society, as it involves a mix of factors that occur in everyday life, mainly from social practices and experiences, whether intentional or not. «In this sense, learning is distributed across the social order and embedded within social practices»²⁰. Exploring this theme makes it possible to resignify social practices, which provides new interpretations of the relationship between education and society, which involves the power relations and ideologies specific to a nation or location, elements that are directly linked to formal education.

In Brazil, many authors in the field of History of Education²¹ address

²⁰ Regarding the lack of protagonism of informal education in research, see R. Edwards, J. Gallacher, S. Whitaker, *Introduction – Tangled up in learning*, in R. Edwards, J. Gallacher, S. Whitaker (edd.), *Learning outside the academy: international research perspectives on lifelong learning*, London, Routledge, 2006, pp. 1-8, in partic. p. 3, <<https://www.taylorfrancis.com/pdfviewer/>> (last access: 20.02.2024).

²¹ In this excerpt from the text, we refer to the following authors and works: M.M.C. Carvalho, *Molde nacional e fôrma cívica: higiene, moral e trabalho no projeto da Associação Brasileira de Educação (1924-1931)*, Bragança Paulista, EDUSF, 1998; W. Gonçalves Neto, *Repensando a história da educação brasileira na Primeira República: o município pedagógico como categoria de análise*, in J.C. Lombardi (ed.), *Navegando na História da Educação Brasileira*, Campinas, Faculdade de Educação-UNICAMP, 2006, CD-ROM, n.p.; C. Monarcha, *A instrução pública nas vozes dos portadores de futuros (Brasil-séculos XIX e XX)*, Uberlândia, EDUFU, 2016, Coleção História, Pensamento, Educação, Série novas investigações, Vol. 8; J. Nagle, *Educação e sociedade na Primeira República*, 3rd ed., São Paulo, Editora da Universidade de São Paulo, 2009; M.B.M. Rocha, *Matrizes da modernidade Republicana: cultura política e pensamento educacional no Brasil*, Campinas, Autores Associados, Brasília, Editora Plano, 2004; D. Saviani, *O legado educacional do longo século XX brasileiro*, in D. Saviani (ed.), *O legado educacional do século XX no Brasil*, Campinas, Autores Associados, 2004, pp. 9-57; R.F.

the issue of informal education, mainly from the hindsight of the means that disseminated republican ideals among the population, starting in the 1870s. These researchers discuss how the republican movement, to establish itself in the face of imperial customs and ‘vices’, used mainly associations, republican clubs, the press, and even public and private educational institutions to build the desired nation. These agents disseminated symbolic ideas and practices in the construction of new democratic and liberal subjectivities, the aim being to mobilize collective memory in the formation of republican citizens.

In the research conducted in Brazilian journals on the History of Education, numerous examples were found throughout the country of agents who, through informal education, disseminated republican precepts, such as associations of immigrants, religious people, politicians, clubs, newspapers, and schools²². The research on Piracicaba found that, as in the rest of the country, the press, associations, and clubs of politicians, immigrants, some religious people, such as the Methodists, and mainly state schools, disseminated republican ideals among the population mainly through the promotion of public events.

This movement of the relationship between formal and informal education, in this time frame, with the participation of diverse institutions and information vehicles, also occurred in other countries. The journal «History of Education & Children’s Literature» – vol. X, n. 1, 2015 – brings in its core the first part of the dossier *Nineteenth – and Twentieth-century schools as a*

Souza, *Alicerces da pátria: história da escola primária no estado de São Paulo (1890-1976)*, Campinas, Mercado das Letras, 2009.

²² Some examples include the following articles: M.R. Periotto, *Imprensa, intelectuais e educação: o Brasil em debate no século XIX*, «Revista HISTEDBR On-line», vol. 13, n. 53, oct. 2013, pp. 41-55, <<https://periodicos.sbu.unicamp.br/ojs/index.php/histedbr/article/view/8640192/7751>> (last access: 07.09.2023); J.C.C. Costa, *Intelectuais, instrução e espaço público no Brasil Império: uma análise do pensamento político e educacional de Tavares Bastos*, «Rev. bras. hist. educ.», vol. 15, n. 2 (38), may/aug. 2015, pp. 81-109, <https://periodicos.uem.br/ojs/index.php/rbhe/article/view/38925/pdf_62> (last access: 15.07.2023); M.S.I. Gomes, L.M. Faria Filho, I.M. Mesquita, *A educação no espaço público: a pedagogia cívica dos jornais mineiros no período regencial*, «Cadernos de História da Educação», vol. 17, n. 3, sep./dec. 2018, pp. 604-626, <<https://seer.ufu.br/index.php/che/article/view/46013/24598>> (last access: 25.07.2023); M.C. Zica, P.B. Oliveira, *Modelos de Espaço Público em contraste: imprensa e modernidade seletiva nas províncias da Paraíba e Pernambuco (1870-1880)*, «Cadernos de História da Educação», vol. 17, n. 3, sep./dec. 2018, pp. 650-667, <<https://seer.ufu.br/index.php/che/article/view/46016/24601>> (last access: 15.05.2023); G.C.V. Gatti, D. Gatti Júnior, *As representações na imprensa de práticas cívico-patrióticas em instituições escolares de Minas Gerais (Brasil) na primeira metade do século XX*, «Rev. HISTEDBR On-line», vol. 18, n. 1 (75), jan./mar. 2018, pp. 29-42, <<https://periodicos.sbu.unicamp.br/ojs/index.php/histedbr/article/view/8651600/17760>> (last access: 15.07.2023); M.S.I. Gomes, L.M. Faria Filho, *Sociabilidades, espaço público e formação do povo em Minas Gerais no período regencial (1831/1840)*, «Temporalidades – Revista de História», ed. 30, vol. 11, n. 2, may/aug. 2019, pp. 274-293, <<https://periodicos.ufmg.br/index.php/temporalidades/article/view/14783/12201>> (last access: 10.07.2023).

laboratory for the promotion of national identity and citizenship education, with a series of examples that coincide with what was happening in Brazil and Piracicaba. The following articles stand out: by Brühwiler²³, on the use of schools and periodicals as part of education focused on citizenship and nationality in Switzerland in the 1910s, at a time of social and political change; by Uphoff²⁴, on a German policy called *Heimat*, which used teaching materials as one of the tools to promote a sense of national collectivity, with the help of local elites and politicians; and Pintasilgo and Silva²⁵, which refers to the experience of school decentralization in Lisbon, Portugal, in an ambitious project to modernize popular education, which involved military gymnastics and school battalions, which paraded through the streets of the cities, in this case, the parallel with Brazil is close, as the same occurred at the beginning of the Republic.

This research is based on the principle that these three types of education do not occur in isolation, but rather complement each other in the form of different arrangements. At the local level, the articulations and synergies between formal, informal, and non-formal education allow for the perspective of «territorialization of educational action»²⁶, which presupposes the development of networks and partnerships. It is from this perspective that the most striking situations found in Piracicaba will be presented.

2. *The link between formal, non-formal, and informal education in Piracicaba*

Between 1880 and 1910, Piracicaba underwent urban remodeling. Its economy, which was basically agricultural and slave-based, was boosted by the arrival of European and North American immigrants, and the growth of commerce and industry, in addition to attracting many liberal professionals. Its politics gradually changed from a monarchist tendency to a republican one. One of its greatest developments was the educational area, especially after the Republic, which had the participation of private individuals and the municipal and provincial/state governments, to the point of being recognized as the

²³ I. Brühwiler, *Citizenship education in Switzerland before, during and after the First World War*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 99-120.

²⁴ I.K. Uphoff, *The construction of Heimat on German wallcharts in the early 20th century, and the part it played in creating a national identity*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 121-138.

²⁵ J. Pintasilgo, C.M. Silva, *School military education and the construction of a national identity in Portugal in the passage from the 19th to the 20th century*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 339-359.

²⁶ R. Canário, *A Escola tem Futuro? Das Promessas às Incertezas*, Artmed, 2006, p. 119.

«Paulista Athenaeum»²⁷, that is, the center of education in the interior of the state of São Paulo.

Informal education in Piracicaba, during this period, played a relevant role in building a new mentality among the population, about republican values. Piracicaba was one of the main cradles of the Republic in the country, with emphasis on the Moraes Barros family, in the persons of the brothers Prudente José, provisional governor of São Paulo at the implementation of the Republic and, later, the first civilian president of the country, and Manoel, councilman, and senator, besides the latter's sons Paulo and Antônio.

One of the main means of instilling republican ideals in the population was the newspaper «Gazeta de Piracicaba», founded in 1882. It was financed by local republicans, which included farmers, professionals, politicians, educators, and merchants. The newspaper vehemently criticized the Empire and the monarchists, with editorials and opinion pieces that sought to demonstrate to the public the advantages of the Republic²⁸. In the country, in general, the press was a means of disseminating ideas and information, trying to present them with a supposedly universal character, which implies the configuration of the networks of social, cultural, and political power. During the period marked by the abolition of slavery and the Proclamation of the Republic, republican newspapers appeared in practically all capitals and many cities in the interior, which called for reforms on different subjects and issues²⁹.

However, since at that time not everyone knew how to read, some local associations of immigrants, politicians, and freed blacks promoted events at their headquarters and in public spaces and participated in actions in support of the republican cause. The most representative in Piracicaba were: the Portuguese Charitable Society, Spanish Charitable Guild, September 20th Society, Italian Mutual Aid Society, Victorio Alfieri Guild, Syrian Association, Literary Guild, Avanti Socialist Circle, Antonio Bento Association, Club of Piracicaba, Republican Club, Workers' Charitable Society, Egalitarian Instructive

²⁷ About the main characteristics of the municipality of Piracicaba consult *Gazeta de Piracicaba, 1882-1911 – editions n. 1 to 5.289*, Piracicaba, Collection of the Historical and Geographical Institute of Piracicaba – IHGP; L. Guerrini, *História de Piracicaba em quadrinhos*, Piracicaba, Imprensa Oficial do Município de Piracicaba, 1970, Vol. 1; M.T.G. Percin, *A Síntese Urbana*, Piracicaba, Equilíbrio & Instituto Histórico e Geográfico de Piracicaba – IHGP, 2009; M.C.T.M. Torres, *Piracicaba no século XIX*, Piracicaba, Equilíbrio & Instituto Histórico e Geográfico de Piracicaba – IHGP, 2009.

²⁸ About the periodicals existing in the municipality of Piracicaba during this period, consult A.C.F. Queiroz, *A trajetória do 'Jornal de Piracicaba' diante da história e do desenvolvimento da cidade no século XX*, São Bernardo do Campo, Cátedra UNESCO, Metodista de Comunicação, 2008.

²⁹ About the history and characteristics of the press in Brazil see T.R. Luca, *Fontes Impresas – História dos, nos e por meio dos periódicos*, in C.B. Pinsky (ed.), *Fontes históricas*, São Paulo, Contexto, 2008, pp. 111-153; N.W. Sodrê, *História da imprensa no Brasil*, 4th ed., Rio de Janeiro, Mauad, 1999.

Society, Iracema Society, Vila Rezende Agricultural Cooperative and Monte Alegre Workers' Charitable and Cooperative Society.

Since education was considered one of the main tools for achieving the desired society, where democracy and liberal principles prevailed, at the beginning of the Republic, many of these associations maintained their own primary schools. These represented another way of disseminating republican principles to children and their parents, based on a close link between informal and formal education. Another educational institution with a great influence on the dissemination of republican principles and with a strong link with the Moraes Barros family was Piracicabano School, maintained by an association of the Methodist Church in the United States of America.

With regard to the public schools in the state of São Paulo, at the beginning of the Republic, they were like «resonances of a broad civilizing project, of social ordering, the moralization of customs, discipline of the working class and inculcation of civic-patriotic values»³⁰. The School Groups were created to gather several isolated primary schools in a single building, which generally had a masterful architecture and modern pedagogical proposal. They were located in the cities, served a diverse population, and consecrated school rituals such as exams and end-of-year parties, as well as civic celebrations. In Piracicaba, there were two School Groups, a Complementary School – primary, which also trained teachers – and the Practical Agricultural School, which operated along these lines. The example of the Piracicaba Complementary School is one of the most emblematic, as it was used as a space for the production of republican memory, which established a social dynamic that involved «values, power relationships, educational, cultural and political rites, producers of memory and histories lived within the educational experience that would be relayed to future generations of citizens of the Republic»³¹.

By reading all available editions of the «Gazeta de Piracicaba» newspaper from 1882 to 1910, we identified that all these agents worked together to build a new social subject by instilling a republican mentality in the population. Three situations stood out: marches, visits to the graves of local politicians, and the reception of authorities at the train station. In Piracicaba, the marches aimed to celebrate civic-patriotic dates and the inauguration or anniversary of some educational institution. The press publicized this event with messages that called for public participation, highlighting the importance of honoring and valuing the precepts of the new political and moral order, pointed to as an example of patriotism and civility. After the celebration, its pages highlighted

³⁰ R.F. Souza, *Alicerces da pátria: história da escola primária no estado de São Paulo (1890-1976)*, Campinas, Mercado das Letras, 2009, p. 126.

³¹ T. Honorato, A.C.B. Nery, *The normal school of Piracicaba as a memory place of the republican regime in Brazil*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 163-182, in partic. p. 164.

in detail the participation of students and teachers from different institutions, as well as members of associations who paraded in uniform, with flags and banners.

After the deaths of the brothers Prudente and Manoel Moraes de Barros in 1902, the custom of holding large funerals and visiting the tombs of illustrious republicans began in Piracicaba. Over the years, schools and associations organized groups to visit the cemetery to lay flowers on the graves, in a movement very similar to the events mentioned above. It was an unquestionable manifestation of the link between education and nationalism, as a form of sociopolitical integration. The local press was once again present, both in publicizing and describing what happened, as a privileged device in the formation of the subject/citizen.

The participation of formal educational institutions in events related to the death of prominent national politicians was a custom of that period. An example of this is all the ceremonies that involved the funeral and subsequent tributes to Fridtjov Berg, Sweden's Minister of Education, in 1916. This was a movement that fostered the relationship between death, collectivity, and status, through rituals that aimed to build the collective memory of figures important to the national identity³².

Another custom that began after the Republic, and which involved the participation of the agents mentioned above and the organization of the local city council, was the reception of state and federal politicians at the city's central train station. The municipal stewardship and council members called on the public, through the press, to participate in the event, highlighting the importance and reason for the visit, which was usually for the inauguration or inspection of some work, often an educational institution. Public associations and schools, not only large ones but also small ones, both public and private, would participate, lining the streets where the authorities would pass.

This entire movement corresponded to the process of social, political, economic, and educational transformation, through a project to shape the population in search of a desired society, which included a myriad of agents. According to some theorists, this theme, due to its importance, deserves more attention from researchers:

The discursive practices of the civic-nationalist organizations of the First Republic have received little attention from historians: empty chatter, a sham of ideology indicating the impotence of bourgeois politics. As a result, the organizing role that civic discourse played, due to its high degree of generality, relativizing or even erasing divergences and inaugurating spaces for consensual action, whether in each of the organizations or in the space where they converge, has also been underestimated. More than this, the importance

³² This example can be seen in the following article: J. Landahl, A. Ullman, *The politics of immortality: the funeral of an education minister and teacher unionista*, «History of Education & Children's Literature», vol. XIV, n. 1, 2019, pp. 261-278.

of the practice of the aforementioned organizations in constituting an ideal profile of the citizen with whom what was considered to be the conditions for exercising citizenship has been minimized³³.

Another phenomenon was also observed, identified as a link chaining between formal, non-formal, and informal education in Piracicaba, which was how the change in mentality among the population, regarding the importance of education in the Republic (informal education), caused a decrease in the supply of home education (formal education) and an increase in the number of educational institutions (formal education) – public and private – of different modalities, educational levels, and target audience, and, to a lesser extent, private lessons (non-formal education), which in turn helped students both in entering schools and in remaining there.

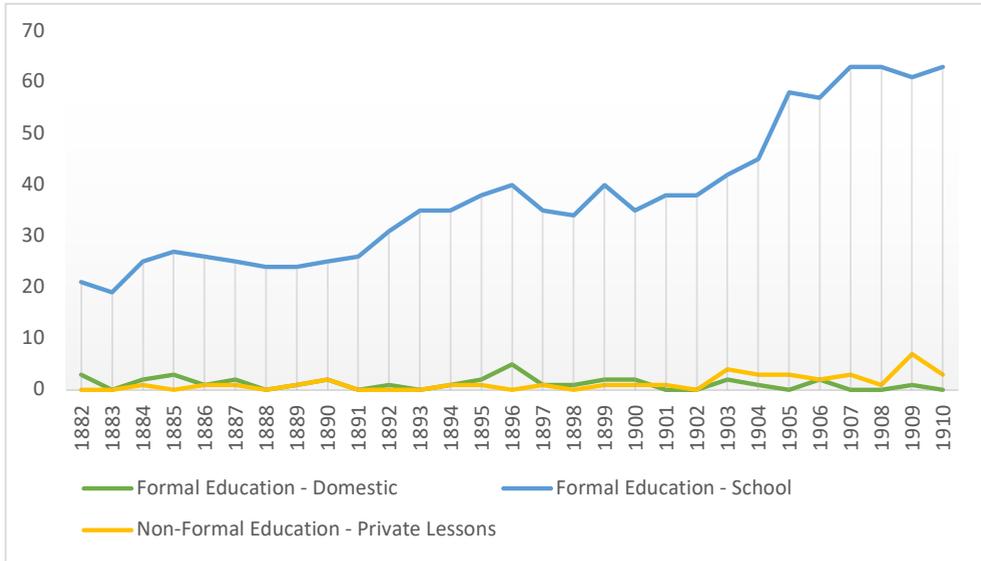
This dynamic can be observed in Graph 1. It is worth noting that the data collected on formal school education were taken from official municipal and provincial/state documents. However, as no official documents were found on formal home education and non-formal private lessons, as previously explained, other authors also did not find this type of data in these sources. They were taken from the local press, from the advertisements section of the «Gazeta de Piracicaba» newspaper. This means that we can consider these data as representative, as there is a possibility that other educators advertised their services in another way. As the «Gazeta de Piracicaba» newspaper started in 1882, this was the year in which the time frame of the graph began.

At the end of the Empire (1882-1889), the number of school institutions increased by 14.28%, going from 21 to 24, while home education varied between three and one advertisement per year. Within two years there were no advertisements at all, a rate too low to convert into a percentage, as well as the number of advertisements for private lessons, which were even lower, and varied between one and none per year. In the first years of the Republic (1890-1899), school institutions increased by 60%, going from 25 to 40, home education advertisements remained at an average of between two and one per year, practically remaining at the level of the end of the Empire, except for 1896, with five advertisements, and private lessons advertisements varied between one and two per year, also with a level similar to the previous period.

In the second decade of the Republic (1900-1910), the number of school institutions increased by 80%, going from 35 to 63. Advertisements for home education within the first five years of this period varied between two and one, and in the other five years, there were no advertisements, especially at the end of this period. Concerning advertisements for private lessons, the average was between one and three per year, with a highlight in 1909, with seven advertise-

³³ M.M.C. Carvalho, *Molde nacional e fôrma cívica: higiene, moral e trabalho no projeto da Associação Brasileira de Educação (1924-1931)*, Bragança Paulista, EDUSF, 1998, p. 137.

Graph 1. Movement of variation in the amount of home education, school education, and private lessons in Piracicaba, between 1882 and 1910. Graph prepared by the authors. Source: Gazeta de Piracicaba (1882-1910); Minute Books of the Piracicaba City Council (1880-1910); Official Books of the Piracicaba City Council (1900-1910); Laws and Resolutions Books of the Piracicaba City Council (1900-1910); Reports of the Municipal Education Inspectors (1900-1910); São Paulo State Education Yearbooks (1907/1908, 1908/1909, 1909/1910, 1910/1911)



ments. This data is in line with what was considered a movement engendered by several agents, which preached the importance of school as a symbol of social changes, in which the principle of compulsory education, conciliation between state and free education, subsidies and incentives for private schools flourished throughout the country³⁴.

Considerations

The local press, publicized practices, and legislation describe the characteristics of formal, non-formal, and informal education in Brazil and the province/state of São Paulo at the end of the Empire and the beginning of the Republic (1880-1910). Thus, there was a situation that promoted the belief that education could be used to shape a new type of citizen who would think and

³⁴ This concept can be better understood in D. Saviani, *O legado educacional do longo século XX brasileiro*, in D. Saviani (ed.), *O legado educacional do século XX no Brasil*, Campinas, Autores Associados, 2004, pp. 9-57.

act in accordance with republican ideals. This occurred in the intertwining of different institutions, political groups, and social agents, who encouraged formalized school education, the private lessons that supported it, and the intense propagation of collective and urban practices permeated by democratic and liberal symbolism. This scenario alludes to the different forms of learning, which correspond «in essence, to a temporally and spatially broad and diffuse process that is part of another, also broad and multiform, process of socialization»³⁵.

The case of Piracicaba demonstrates how this entire movement developed at a local level, where within the limited space of a Brazilian municipality in the state of São Paulo, there was a close connection between the transformations in political, social, and educational culture. Piracicaba not only stood out for the number of educational institutions but also for being a space for civic and political education, which sought to shape the mindsets and behaviors of its citizens. The initiatives and actions of the local press were fundamental in including education in the debate on the construction of a republican citizen, promoting the visibility of select educational institutions and political groups of the time.

The situations presented about Piracicaba demonstrate how different forms of formal, non-formal, and informal education intertwined in a context that involved different sectors and institutions. This takes us back to the theories that preach about the importance of understanding the parallels between the national, regional, and local plans, as these reveal an interconnectivity between the different possibilities of educational actions.

³⁵ R. Canário, *A Escola tem Futuro? Das Promessas às Incertezas*, Artmed, 2006, p. 26.

I libri di divulgazione per l'infanzia nel panorama internazionale. Questioni teoriche, cenni storici e nuovi sviluppi

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Nonfiction for Children. Theoretical issues, historical overview and new developments

ABSTRACT: This article presents an analysis of children's nonfiction: its definition, its evolution, the question of whether it can be considered part of children's literature altogether, or rather a corpus of books that are different from the narrative, poetic, imaginative, 'artistic' children's titles. In the attempt to understand which elements can contribute to the creation of a quality nonfiction, special attention is paid to the so-called 'pictorial turn', and more specifically to the nonfiction picturebook, a publishing phenomenon that started during the 2000s at an international level. The nonfiction picturebook is especially interesting, as a medium, because, both content – and form-wise, it is characterized by a strong experimental and innovative drive, and this inevitably affects the way knowledge is communicated and shared with children.

EET/TEE KEYWORDS: Nonfiction; Children's literature; Children's publishing; Picturebook; XX-XXI Centuries.

Considerazioni preliminari

Nell'ambito dell'editoria, anche per l'infanzia, è *nonfiction* il termine usato a livello internazionale per indicare lo scaffale che in Italia viene chiamato genericamente 'di divulgazione'. Storicamente, i libri per bambini di questo scaffale possono essere ricondotti alla tradizione anglosassone dei cosiddetti *books of instruction*: libri contenenti il tipo di informazione che gli adulti ritengono opportuno, necessario, urgente o importante per i bambini conoscere. Ciò che l'infanzia deve conoscere ovviamente varia a seconda del contesto

culturale e di generazione in generazione. Ma, nel corso dei secoli, quello che si è modificato e si modifica continuamente, oltre al contenuto di questi libri informativi/istruitivi, è anche il modo in cui la conoscenza viene comunicata ai bambini e, prima ancora, il presunto ruolo dei bambini-lettori quali interlocutori nel processo di condivisione della conoscenza. I bambini possono essere considerati recipienti passivi di dati, nozioni, spiegazioni presentate come autorevoli, indiscutibili e oggettive, da imparare/memorizzare come tali. Oppure possono essere intesi come lettori da coinvolgere attivamente non solo dal punto di vista cognitivo, ma anche sensoriale ed emozionale, attraverso opere che, in questo caso, saranno pensate per suscitare il loro interesse, la loro curiosità, un senso di meraviglia, e si presenteranno verosimilmente come opere dialogiche, strutturalmente concepite non per fornire risposte definitive, bensì per sollevare domande, dubbi, confronti, per attivare inferenze, connessioni, interpretazioni, oltre ad una sollecitazione di tipo estetico. L'idea di bambino-lettore implicita nella *nonfiction* non è sempre così chiaramente distinguibile e la differenza tra libri il cui contenuto è presentato come 'dato' e libri che richiedono il coinvolgimento del lettore per produrre significato può non essere immediatamente evidente e certo non caratterizza in modo netto il passato rispetto al presente, come si potrebbe essere portati a pensare. Libri informativi preoccupati di attrarre e coinvolgere a tutto tondo i bambini sono stati creati nei secoli scorsi, mentre troviamo non di rado titoli di divulgazione dogmatici, non dialogici, caratterizzati da un tipo di trasmissione della conoscenza unilaterale e monolitica nei cataloghi degli editori dei nostri giorni. Gli studiosi criticamente interessati ai libri di divulgazione, così come gli educatori o altri adulti che nel quotidiano li utilizzano con i bambini, dovrebbero saper riconoscere questi aspetti, nonché tener presenti altre questioni fondamentali. È necessario saper distinguere, in un titolo di divulgazione, l'informazione dall'ideologia, ovviamente, ma è anche opportuno ragionare intorno alla differenza tra informazione e conoscenza¹; occorre riconoscere le strategie testuali e visuali impiegate dai libri *nonfiction* per ottenere l'una o l'altra²; bisogna capire se quel che si vuole condividere con i bambini sono i risultati della scienza o piuttosto le intuizioni iniziali e le procedure che hanno portato e portano a determinate conclusioni; decidere se il focus di un libro sono/debbono essere le certezze che l'autore (e una determinata comunità) considera acquisite o piuttosto la natura precaria, relativa, rivedibile di qualunque nozione; rendersi conto se ciò che si sta offrendo ai bambini è una conoscenza chiusa oppure aperta a forme di negoziazione³. In sostanza, quando ci si occupa di *nonfic-*

¹ M. Aronson, *New Knowledge*, «The Horn Book Magazine», March 01, 2011, pp. 57-62.

² N. Goga, S.H. Iversen, A.S. Teigland (edd.), *Verbal and Visual Strategies in Nonfiction Picturebooks. Theoretical and Analytical Approaches*, Oslo, Scandinavian University Press, 2021.

³ J. Sutliff Sanders, *A Literature of Questions. Nonfiction for the Critical Child*, Minneapolis, University of Minnesota Press, 2018.

tion, è essenziale chiedersi se il suo fine ultimo sia quello di trasferire una serie di verità accettate e prestabilite sul mondo, o quello di sviluppare domande, curiosità, interesse, passione e pensiero critico nei confronti di esso.

1. *Questioni terminologiche ed epistemologiche*

La *Oxford Encyclopedia of Children's Literature* definisce la *nonfiction* come il corpus di libri «scritti per impartire informazioni e trattare idee riguardanti vari argomenti propri delle scienze sociali, della tecnologia, delle arti, delle attività del tempo libero, delle scienze umane e della storia»⁴. In generale, a rigore, sono inclusi nella *nonfiction* per l'infanzia anche i testi scolastici, ma in questo articolo ci occuperemo solo dei libri *nonfiction* per bambini che non sono stati concepiti come testi per la scuola anche se possono ovviamente essere utilizzati dagli insegnanti in classe, accanto e in aggiunta ai volumi specificamente di editoria scolastica. E naturalmente sono *nonfiction* i grandi progetti editoriali come le enciclopedie e quelli che gli anglosassoni chiamano i *reference books* (dizionari, manuali, ecc.), pubblicazioni, anche queste, che non entreranno a far parte della presente analisi perché, come i testi scolastici, sono inevitabilmente prodotti istituzionalizzati, controllati da tutta una serie di comitati editoriali/redazionali e di filtri, vincolati a un'esigenza programmatica di neutralità, prudenza, condivisione, aderenza a una indiscutibile convenzionalità relativa tanto ai contenuti quanto alle forme, mentre la *nonfiction* che qui ci interessa è quella che può essere prodotta da editori anche piccoli e indipendenti, ma soprattutto da autori e illustratori potenzialmente liberi e innovativi rispetto alle categorie del sapere e ai modi di comunicarlo propri del sistema culturale più strutturato e ufficiale. La *nonfiction* non scolastica e non enciclopedica – in sostanza, la *nonfiction* 'autoriale' – comprende oggi titoli di tantissimi tipi e formati, i suoi contenuti riguardano ambiti e argomenti potenzialmente infiniti e i suoi destinatari sono giovani lettori delle età più varie. I titoli di questo scaffale spaziano, infatti, dai cosiddetti *early-concept books*⁵ destinati a bambini piccolissimi e concepiti per spiegare un'idea, un oggetto o un'azione mettendo insieme un'immagine con una parola, a libri anche molto corposi adatti a lettori adolescenti per la tipologia degli argomenti trattati. In entrambi i casi, possiamo trovare libri lineari, diretti, espliciti, in qualche modo prevedibili, o al contrario libri sorprendenti, non scontati, sofisticati: nei

⁴ *Oxford Encyclopedia of Children's Literature*, Vol. 3, p. 160. La traduzione è mia. In tutto l'articolo, sono state tradotte direttamente in italiano le citazioni di autori stranieri.

⁵ B. Kümmerling-Meibauer, J. Meibauer, *Early-Concept Books and Concept Books*, in B. Kümmerling-Meibauer (ed.) *The Routledge Companion to Picturebooks*, New York, Routledge, 2018.

concept books perché magari il design è tale da eludere la possibilità di una associazione automatica e inequivocabile tra parola e figura e ogni combinazione è pensata per far riflettere, dubitare, invitare a interpretare; nei libri per ragazzi più grandi perché magari si affrontano argomenti non banali, trattati in modi innovativi (solo per fare alcuni esempi: le idee e le rappresentazioni della morte nelle diverse culture; le strade che sono state più importanti nella storia dell'umanità per commerci, scambi, avventure; le diverse e a volte sorprendenti zoofobie, presentate attraverso illustrazioni evocative, ecc.).

La categoria *nonfiction* per bambini più rappresentata oggi è senza dubbio quella dei libri di scienze e in particolare di scienze naturali, riguardanti infiniti aspetti del regno animale e vegetale (i fossili, i dinosauri e altre specie estinte o in via di estinzione, l'evoluzione, le bestie e le piante più comuni oppure più rare, le loro forme, caratteristiche, abitudini, habitat), la geografia (mappe, montagne, vulcani, mari, fiumi, paesaggi, nonché città e altre dimensioni antropiche), l'astronomia (lo spazio, i pianeti, il sistema solare), i fenomeni atmosferici, il clima e – sempre più – i cambiamenti indotti dall'Antropocene. Anche i libri sulla lingua e il linguaggio costituiscono una categoria molto ampia e variegata e comprendono gli alfabetieri, i titoli sullo sviluppo dell'alfabeto e la storia della scrittura, i libri su parole straniere, quelli sulle parole 'strane', anche nel senso di difficilmente traducibili⁶, nonché i numerosi titoli incentrati sui giochi di parole e l'uso della lingua con le sue particolarità (le figure retoriche, gli idiomi, le comparazioni, le parole omografe, i sinonimi, gli opposti...). Tanti sono anche i libri *nonfiction* su concetti matematici, a partire dai più elementari *counting books*, libri per imparare a contare (che possono essere semplici cartonati di poche pagine, terminanti col numero 10, ma anche volumi di grande formato che arrivano a cifre altissime e non mancano di creare, per chi li sa cogliere, intrecci, rimandi, fili narrativi fra le figure disegnate e accumulate nelle pagine)⁷, per arrivare ai libri sulle dimensioni, le misure, le distanze, gli spazi, le velocità, i record e altre cifre relative ai fenomeni del mondo che – da sole o giustapposte per creare confronti⁸ – possono sorprendere, impressionare, far pensare. Ci sono libri *nonfiction* sull'anatomia e fisiologia umana, da sempre tra i più controversi per ciò che mostrano e come⁹; libri sulle architetture e le tecnologie, per i quali pionieristici rimangono i titoli di David Macaulay che a partire dagli anni Settanta del Novecento ha creato

⁶ Si veda l'interessante volume *What a Wonderful Word. A collection of untranslatable words from around the world*, di Nicola Edwards and Luisa Uribe, Little Tiger Press, 2018. Il volume esiste anche in edizione italiana: N. Edwards, L. Uribe, *Che bella Parola! Parole intraducibili da tutto il mondo*, Trieste, Emme Edizioni, 2018.

⁷ Si veda il fortunato volume norvegese: K. Roskifte, *Alle Sammen Teller*, Oslo, Magikon, 2018, tradotto in 27 paesi, compresa l'Italia: K. Roskifte, *Tutti quanti contano*, Milano, Emme Edizioni, 2020.

⁸ Si veda per esempio *Chaque seconde dans le monde*, di Bruno Gibert, Actes Sud, 2018.

⁹ Si veda l'audace, *It Isn't Rude to Be Nude*, di Rosie Haine, Tate, 2020.

volumi di grande successo internazionale su come sono fatti e come funzionano certi artefatti umani; e poi libri sull'arte, la musica, la danza, i mestieri, gli sport, le religioni, le grandi domande filosofico-esistenziali. E naturalmente libri di argomento storico, da quelli propriamente dedicati a rappresentare la storia dell'umanità dagli inizi ai giorni nostri a quelli concentrati su episodi o aneddoti particolari, degni di essere ricordati. A partire dagli anni Settanta, anche grazie all'istituzione, negli USA, del Coretta Scott King Award, un premio nato per riconoscere i libri per bambini di qualità che riflettono l'esperienza afroamericana, sempre più numerosi sono stati e sono i titoli che si occupano di temi multiculturali, in un senso poi molto più ampio e inclusivo di tutte le minoranze rispetto alla cultura dei bianchi occidentali. Si tratta di libri che mettono in luce contesti e abitudini di vita di soggetti di diversi paesi, culture, estrazioni sociali. Uno spazio ampissimo viene oggi dedicato al ruolo e alle prospettive delle donne, con un numero sempre maggiore di biografie a loro dedicate (libri, questi ultimi, su cui torneremo più avanti, quando affronteremo lo sviluppo storico delle biografie come sottogenere della divulgazione).

Quale che sia il loro focus, in teoria tutti questi libri hanno a che fare con ciò che chiamiamo 'la realtà'. Non a caso, un'altra espressione spesso usata in ambito anglosassone per indicare le molteplici e tra loro quanto mai varie pubblicazioni di *nonfiction* è *literature of facts*, una formula chiaramente concepita per sottolineare come questo tipo di libri nasca per fornire spiegazioni, descrizioni e rappresentazioni oggettive di cose 'vere', appunto fattuali, in contrapposizione alla *fiction*, cioè alla narrativa, alla poesia, ai titoli che ruotano intorno a un'invenzione, all'immaginazione, alla creatività, o comunque alla soggettività dell'autore. L'idea di *nonfiction* generalmente accettata è, cioè, quella di un *corpus* di titoli che offre ai bambini un'informazione accurata sul mondo che, come suggerisce il nome e contrariamente alla *fiction*, non comporta – né tantomeno si fonda su – fantasia, arbitrarietà, originalità nella rappresentazione dell'universo naturale, umano, sociale, culturale. Se confrontiamo le due dimensioni editoriali della *nonfiction* e della *fiction* nei termini delle loro intenzioni, gli scopi della prima sono chiaramente, direttamente, esplicitamente educativi: i volumi *nonfiction* dichiaratamente informano, istruiscono, introducono i bambini a nozioni, a dati, a regole, ad acquisizioni conoscitive condivise. La *fiction*, invece, persegue o può perseguire tutt'altri fini: intrattenere, divertire, spaventare, emozionare, commuovere, turbare e magari, se mai, sovvertire quelle che sono le credenze/convinzioni ufficiali. E se per caso la *fiction* ha anche intenti educativi, questi sono tendenzialmente indiretti, impliciti, nascosti tra le righe di trame e intrecci i cui meccanismi narrativi risultano spesso più potenti del messaggio che si vorrebbe veicolare (quando non anche contraddittori rispetto ad esso)¹⁰.

¹⁰ Solo per fare un esempio, il più noto, *Le Avventure di Pinocchio* è in superficie una parabola di trasformazione da bambino cattivo a bambino buono, come tutti i *moral tracts* scritti con lo scopo di insegnare all'infanzia a comportarsi bene, ma il suo straordinario successo globale

E tuttavia, più ci impegniamo a riflettere su ciò che distingue in linea teorica la *nonfiction* dalla *fiction*, più ci accorgiamo di tante ambiguità e del fatto che i confini di queste dimensioni, per non dire delle intenzioni che le sottendono, sono in realtà estremamente labili. Perché, come scrive Milton Meltzer in un famoso articolo intitolato *Where Do All Prizes Go? The Case for Nonfiction*, pubblicato su *Horn Book* già nel 1976, la miglior *nonfiction* implica sempre «immaginazione, invenzione, selezione, lingua e forma», cioè una qualità che non dovremmo esitare a chiamare artistica e che per sua natura mette di fatto in discussione l'idea di una letteratura oggettiva, puramente informativa, in qualche modo differente dall'«altra» letteratura¹¹. Secondo Nikola von Merveldt il termine *nonfiction* è fuorviante perché tende a confondere l'intenzione di un autore di presentare alcuni aspetti del mondo reale con le strategie comunicative impiegate per farlo. Tali strategie possono includere – e spesso lo fanno – dispositivi narrativi, immaginativi e stilistici che sono tipici della *fiction*, oltre all'argomentazione logica e a un'esposizione accurata di quelli che sono fatti, dati, cifre¹². L'utilizzo di studiati meccanismi narrativi, immaginativi e stilistici è non solo legittimo, ma cruciale perché la comunicazione di qualunque cosa possa essere efficace. È questa constatazione che ha portato studiosi come Meltzer a sostenere che la *nonfiction*, compresa quella per l'infanzia, dovrebbe essere considerata legittimamente parte della più ampia letteratura e giudicata sulla base di quei criteri/valori estetici di cui i critici vanno sistematicamente alla ricerca nei libri per bambini, ma hanno, fino a tempi recenti, trascurato di aspettarsi, di esigere, o di rendere oggetto di attenzione quando hanno avuto a che fare con i libri di divulgazione.

Nel 1972 Margery Fisher fu la prima studiosa a lamentare il fatto che «a causa di una inespresa sensazione che i libri informativi non fossero 'creativi', sono stati molto più spesso giudicati per il loro contenuto, piuttosto che per il loro valore letterario totale»¹³. Di regola, i recensori generalmente si assicura-

(immensamente più ampio e profondo di quello di incalcolabili altri titoli edificanti mai diventati 'classici' nella storia dei libri per bambini) è sicuramente dovuto alla presenza, in esso, di zone oscure, personaggi fantastici, atmosfere oniriche, twist narrativi, momenti di spavento, pericoli di morte, rimandi a passaggi iniziatici, elementi magici... insomma al potere intrinseco dell'arte dello *storytelling* che dal mito giunge fino a noi passando per fiabe, racconti popolari, racconti picareschi, *feuilletons*, letteratura dell'orrore, dove le fughe, le trasgressioni, gli inseguimenti, gli assassini, i mostri, i divoramenti, le fate, gli animali parlanti si imprimono nel lettore molto più dell'idea di dover diventare un bambino migliore. Dove, cioè, il *Mythos* si rivela assai più travolgente e incisivo dell'*Ethos*, una caratteristica, questa, che è propria di tutta la grande letteratura, o della letteratura che si dimostra capace di trascendere il luogo, il tempo, i valori e i costumi sociali di chi la produce.

¹¹ M. Meltzer, *Where Do All the Prizes Go? The Case for Nonfiction*, «The Horn Book Magazine», February 08, 1976, pp. 17-23.

¹² N. Von Merveldt, *Informational picturebooks*, in Kümmerling-Meibauer (ed.), *The Routledge Companion to Picturebooks*, cit.

¹³ M. Fisher, *Matters of Fact. Aspects of Non-Fiction for Children*, London, Hodder & Stoughton, 1972, p. 9.

no che il contenuto sia accurato, preciso, fondato dal punto di vista scientifico: se lo è, il libro tende a superare l'esame critico e ad essere giudicato in modo positivo. Secondo Fisher, però, quando si giudica la *nonfiction* come parte della letteratura per l'infanzia, perfino il titolo più preciso e rigoroso dal punto di vista informativo dovrebbe essere considerato inadeguato, se manca totalmente della capacità di coinvolgere il lettore. Un libro di divulgazione pedante, noioso, assertivo – e la sua implicita visione del bambino lettore come di una persona passiva a cui si chiede semplicemente di memorizzare un contenuto – è un fallimento editoriale altrettanto grave di quanto lo è un libro caratterizzato da grossolane imprecisioni o approssimazioni dal punto di vista fattuale. Per Fisher, solo un libro capace di evitare toni assertivi e spiegazioni definitive, di lasciare aperte certe questioni nonché domande, di rivelare l'ignoto oltre al noto – in altre parole, solo un libro capace di mostrare la complessità, la stratificazione, perfino la misteriosità del reale – può portare un bambino a riflettere, a meravigliarsi, a pensare criticamente, che è quanto la letteratura – tutta la letteratura – dovrebbe fare. Assorbire informazioni è un processo prevedibile e passivo, mentre l'acquisizione di conoscenza è un'esperienza aperta che richiede una partecipazione attiva. Abbiamo bisogno, sostiene Fisher, di libri *nonfiction* che offrano ai bambini lettori conoscenza (e il processo che essa porta con sé) piuttosto che mera informazione, di libri che li incoraggino a ragionare e li aiutino a diventare pensatori indipendenti, non di libri che dicano loro quello che devono pensare in modi dogmatici. Più di vent'anni dopo queste prime riflessioni critiche sulla *nonfiction* la pedagogista britannica Margaret Meek scrisse: «In sé stessa, l'informazione non è né esperienza né conoscenza»¹⁴. Per Meek, i migliori libri *nonfiction* ruotano intorno a un concetto di informazione che «include incertezza, probabilità, formulazione di ipotesi», e che «richiede sempre un dialogo interpersonale»¹⁵. Un libro *nonfiction* che trascuri il senso di meraviglia e l'interrogazione aperta, sostituendole semplicemente con nozioni e dati esatti non è un buon libro *nonfiction*. «I migliori libri *nonfiction* sono i libri che suggeriscono che c'è qualcos'altro da sapere»¹⁶. E tuttavia, l'idea prevalente di *nonfiction* ancora in circolazione resta differente. Tornando su queste questioni nel 2018, Joe Sutliff Sanders sottolinea come la visione più diffusa sia ancora quella per cui la *nonfiction* è, e deve essere, 'una letteratura di risposte', cioè una letteratura che dice il vero, una letteratura che si occupa dei fatti e i cui elementi/valori più importanti sono l'accuratezza dell'informazione e l'attendibilità del contenuto¹⁷. Ma considerare la *nonfiction* come un *corpus* di libri che, anziché invitare a farsi delle domande, fornisce risposte, cioè una conoscenza 'data' e puramente fat-

¹⁴ M. Meek, *Information & Book Learning*, Lockwood, Thimble Press, 1996, p. 15.

¹⁵ *Ibid.*, pp. 18-19.

¹⁶ *Ibid.*, p. 102.

¹⁷ Sanders, *A Literature of Questions. Nonfiction for the Critical Child*, cit.

tuale del mondo, priva di ogni elusività e apertura interpretativa, è fuorviante, oltre che privo di fondamento anche dal punto di vista storico. In parte fin dai suoi esordi, poi nel corso dei secoli e in modo eclatante con l'arrivo del nuovo millennio, la *nonfiction* per l'infanzia si è presentata spesso come 'letteratura', manifestando una vocazione soggettiva, creativa, artistica, pur rimanendo fedele al suo proposito fondamentale che è quello di trattare aspetti tangibili e documentabili del mondo che chiamiamo 'reale'. Solo che questi aspetti non sono (non sono mai stati e non dovrebbero mai essere) tutto, all'interno dei libri di divulgazione. «Lo scopo di base della nonfiction è certamente quello di informare, di istruire, auspicabilmente di illuminare. Ma questo non basta. Una nonfiction efficace deve animare ciò di cui tratta, infonderlo di vita»¹⁸. Secondo Jo Carr, i buoni libri informativi vanno oltre i fatti. «Gli scrittori di talento lavorano con i fatti come gli scultori lavorano con l'argilla – o gli artisti con la pittura, i compositori con la melodia, i poeti con le parole – per dare una forma significativa alla loro percezione delle cose»¹⁹. La forma è centrale per la *nonfiction* come lo è per la *fiction*. «L'arte della fiction è inventarsi i fatti; l'arte della nonfiction è usare i fatti per inventarsi una forma»²⁰. Un bravo autore di *nonfiction*, scrive Meltzer «fa arte», dove il verbo 'fare' è fondamentale. «L'arte non inizia nel momento in cui si sceglie un argomento. È quello che si fa con quell'argomento, o di quell'argomento, ciò che davvero conta»²¹. Un bravo autore di *nonfiction* è prima di tutto un artigiano, il che significa che «possiede una superba tecnica»²². «I fatti non parlano mai da soli. Devono essere selezionati, ordinati, legati insieme, resi eloquenti. L'espressione giusta non è un mero fronzolo aggiunto alla conoscenza, intesa come una cosa già acquisita. L'espressione è la conoscenza»²³. Il lavoro di qualunque autore (di *fiction* o *nonfiction*) inizia ad esistere solo quando trova il linguaggio o le immagini per esprimere quello che vuole comunicare, solo attraverso la sua arte. «Mancando di arte, molti titoli *nonfiction* non contengono altro che parole vuote. Un autore di *nonfiction* deve trovare una forma e una voce che sia capace di ampliare l'esperienza del lettore, di approfondirla, di renderla più intensa»²⁴.

Chiamare i libri di divulgazione *informational books*, cioè libri informativi, come fanno alcuni critici in ambito anglosassone e come suggerisce di fare

¹⁸ E.B. Freeman, D.G. Person (edd.), *Using Nonfiction Trade Books in the Elementary Classroom. From Ants to Zeppelins*, Urbana, National Council of Teachers of English, 1992, p. 3.

¹⁹ J. Carr (ed.), *Beyond Fact. Nonfiction for children and young people*, Chicago, American Library Association, 1982, p. 7.

²⁰ *Ibid.*, p. 3.

²¹ M. Meltzer, *Beyond Fact*, in Carr (ed.), *Beyond Fact. Nonfiction for children and young people*, cit., p. 27.

²² *Ibid.*, p. 28.

²³ *Ibid.*

²⁴ *Ibid.*, p. 29.

von Merveldt per non incorrere nelle contraddizioni e false opposizioni con la *fiction* proprie del termine *nonfiction*, può avere senso, alla luce delle presenti riflessioni, ma non tanto per il riferimento ovvio all'azione di informare, bensì per l'impegno ad in-formare, cioè a 'dare forma' al sapere offrendolo ai bambini in maniera appunto arte-fatta, fatta ad arte, deliberatamente creativa, così che il risultato possa essere qualcosa di diverso da un mero e meccanico trasferimento di dati. Gli autori di *nonfiction* dovrebbero preoccuparsi «non di coprire un argomento allo stesso modo in cui viene inteso dai creatori del curriculum, ma di scoprire qualcosa di significativo in quell'argomento, e di trovare il linguaggio²⁵ capace di portare il lettore allo stesso momento di riconoscimento/illuminazione»²⁶. L'autore – e, nel caso di albi illustrati, l'illustratore – deve avere quella che Meltzer chiama «qualità della visione». «Il fatto in sé stesso è come un sasso, immobile, freddo, una cosa inarticolata, insignificante, finché non gli accade qualcosa... Il fatto deve essere ripassato, rivisto, levigato nella mente, collocato in giustapposizione magnetica con altri fatti, fino al punto in cui inizia a brillare, a emanare quel bagliore che chiamiamo significato»²⁷. Un libro *nonfiction* può qualificarsi come 'letteratura' quando nasce e ruota intorno a un'idea, quando c'è un approccio autoriale all'argomento di cui tratta, e quando «lo stile dell'autore è sufficientemente buono»²⁸. Per tutti questi critici, dunque, sono proprio le scelte stilistiche e le prospettive originali rispetto a qualsivoglia contenuto (anziché un approccio volutamente distaccato, neutro e impersonale) a sollecitare la comprensione e la conoscenza nel lettore. Secondo Carr, un libro *nonfiction* deve sempre essere, esattamente come uno di *fiction*, «autenticamente ispirato»²⁹, solo così può portare il lettore a pensare profondamente ma anche a sentire profondamente. «Un buon libro scientifico tocca la mente, il cuore, l'immaginazione»³⁰. E questo vale, naturalmente, non solo per pubblicazioni che possano dirsi strettamente scientifiche, ma per tutti i tipi di libri di divulgazione.

Quando si parla di 'stile', nella *nonfiction*, ci si può riferire a diverse cose. Alla scrittura, ovviamente, quando adotta toni narrativi o poetici anziché distaccatamente esplicativi e presumibilmente neutri. Alla scelta dell'argomento di cui trattare, quando è poco comune, riferito ad aspetti della realtà minimi, marginali, laterali rispetto ai discorsi mainstream o comunque più esplorati.

²⁵ Anziché 'il linguaggio' potremmo dire più in generale 'l'arte', dato che in questi libri è presente spesso anche il codice visivo.

²⁶ Meltzer, *Beyond Fact*, cit., p. 31.

²⁷ Fisher, *Matters of Fact. Aspects of Non-Fiction for Children*, cit., p. 302.

²⁸ Carr (ed.), *Beyond Fact. Nonfiction for children and young people*, cit., p. 7. Questo discorso vale sia per quel che riguarda il testo che per quel che riguarda le illustrazioni, ove presenti.

²⁹ *Ibid.*, p. 4.

³⁰ E.B. Freeman, *Nonfiction: A Genre Comes of Age*, in L.M. Pavonetti (ed.), *Children's Literature Remembered. Issues, Trends, and Favourite Books*, Westport and London, Libraries Unlimited, 2004, p. 104.

Lo stile può riguardare anche la scelta del punto di vista da cui presentare un certo argomento, soprattutto se si tratta di un punto di vista non ortodosso o poco convenzionale. Hanno a che fare con lo stile anche le scelte riferite alla qualità materiale del libro (il design, il formato, la carta, ecc.), alla composizione grafica della pagina, o alle illustrazioni, quando vengono concepite non come mero supporto al testo ma come elementi in sé stessi espressivi, potenti, evocativi, eloquenti. Tutto questo, e altro ancora, è a disposizione dell'intuizione immaginativa dell'autore che, quando trova efficaci modalità di espressione, dà vita a una 'letteratura' *nonfiction*, cioè a un tipo di comunicazione riferita al mondo reale che non è piatta, neutra, asettica e deterministica, intenzionata ad ottenere una mera registrazione/trasmisione di dati fattuali, ma è vocata a coinvolgere i lettori emotivamente, esteticamente e criticamente favorendo in loro intuizioni, connessioni, inferenze, dubbi ed emozione, insieme all'acquisizione di sapere. In altre parole, la *nonfiction* in qualche modo *necessita* di essere artistica, creativa, esteticamente sofisticata, non solo per raccogliere l'apprezzamento degli esperti, come da citazioni riportate sopra, ma precisamente, e pragmaticamente, per ottemperare con maggior successo alla propria e più vera funzione: condividere conoscenza con i giovani lettori. La *nonfiction*, cioè, *non funziona*, non raggiunge lo scopo per cui esiste – favorire la comprensione del mondo nei bambini lettori – se non è sufficientemente creativa, intrigante, capace di stupire, di attrarre, di lanciare sfide cognitive, interpretative ed emotive, se non riesce ad attivare forme di coinvolgimento e a suscitare piacere. Quando consideriamo la qualità in un qualunque libro per bambini, impliciamo che i bambini abbiano diritto ad una 'bella' scrittura e ad una 'bella' proposta visiva (illustrativa, grafica, compositiva, relativa al formato, alla carta, eventualmente alla cartotecnica...) e questo, nella *nonfiction*, per motivi non solo estetici, ma anche cognitivi, conoscitivi, gnoseologici. Un libro artisticamente sofisticato costituisce una maggiore sfida dal punto di vista intellettuale, inferenziale, ermeneutico, perché è per sua natura più aperto all'interpretazione e a forme di dialogo con il lettore, è potenzialmente più capace di coinvolgerlo, di attivarlo, di interrogarlo, e dunque di appassionarlo. Nella *nonfiction* come nella *fiction*, insomma, la forma è imprescindibile quanto il contenuto, se si vuole parlare di una letteratura capace di catturare il lettore e di *significare* qualcosa per lui/lei.

2. Cenni storici

Convenzionalmente, l'inizio della letteratura per l'infanzia in senso lato viene fatto risalire alla pubblicazione, nel 1658, dell'*Orbis Sensualium Pictus* del teologo ceco Johann Amos Comenius (1592-1670), un'opera a tutti gli effetti *nonfiction*. Scopo del libro era infatti quello di insegnare ai bambini a

leggere sia in tedesco (lingua originale del volume) che in latino, nonché di ampliare il loro vocabolario. Ma l'opera si presentava come molto più complessa di questo, di fatto come una piccola enciclopedia illustrata che si apriva con l'alfabeto e proseguiva con la rappresentazione di vari aspetti del «mondo visibile» che l'autore riteneva i bambini dovessero imparare a conoscere: elementi, fatti, ambienti riguardanti la natura, la geografia, gli sport, gli hobby, le virtù morali, ecc. Il volume era arricchito da un'ampia gamma di illustrazioni, ritenute fondamentali perché l'informazione potesse essere comunicata in modo efficace. Sin dall'esordio di un'editoria a stampa concepita espressamente per l'infanzia, è presente l'intuizione che la conoscenza non possa essere trasferita da libro a bambino a meno che non sia accompagnata da meccanismi di sollecitazione del piacere nel lettore. Comenius era espressamente convinto che, per presentare qualunque tipo di contenuto, fosse necessaria una qualche forma di elaborazione formale aspirante alla bellezza, o comunque a una ricchezza estetica concepita per catturare i sensi del lettore (non a caso menzionati nello stesso titolo dell'opera). L'idea, dietro la creazione dell'*Orbis Sensualium Pictus*, era che ogni aspetto del bambino lettore, anziché soltanto il suo intelletto, dovesse essere chiamato in causa, altrimenti quel che veniva insegnato era destinato a non colpire, a non lasciare alcuna impressione. Il fascino sensoriale del volume, arricchito da 150 tavole illustrate con la tecnica dell'incisione su legno, era cruciale per Comenius, che così lo aveva voluto perché aveva intuito che sollecitare esteticamente il lettore, fargli 'vedere', 'percepire', la scena da conoscere, significava fargliela comprendere in modo più integrato e profondo di quanto qualunque descrizione, spiegazione, analisi o argomentazione logico-verbale sarebbe stata capace di fare. Dopo Comenius, grazie a filosofi come John Locke e Jean Jacques Rousseau nel Diciottesimo secolo, poi ai grandi pedagogisti e psicologi dello sviluppo del Diciannovesimo e Ventesimo secolo (Fröebel, Montessori, Piaget, Bruner, ecc.), questa consapevolezza si è rafforzata, sviluppata, specificata e soprattutto diffusa al punto da risultare ormai ampiamente assimilata e quasi ovvia. Ciò nonostante, hanno continuato sempre ad esserci, e ci sono ancora sui nostri scaffali, tantissimi prodotti editoriali per bambini concepiti con una preoccupazione esclusiva per le nozioni e i messaggi che gli autori vogliono (meccanicamente) trasferire ai lettori, senza che questa preoccupazione sia accompagnata dall'elaborazione di strategie testuali e visuali pensate per coinvolgere i lettori in modi più profondi, per catturare il loro interesse, suscitare meraviglia, fascinazione, interrogativi sugli aspetti del mondo di cui trattano quei libri. Nella storia della *nonfiction*, cioè, nonostante la prima opera fosse così 'moderna' nella sua concezione, innumerevoli autori e editori hanno percorso una strada assai diversa da quella che in modo pionieristico Comenius aveva indicato nel tentativo di coniugare «istruzione e divertimento», come avrebbe detto, poi, nel 1744 John Newbery, l'editore inglese che con quello slogan lanciò la prima campagna di marketing di libri per bambini. Dove con 'divertimento' non si deve intendere un'incurante e

spensierata forma di intrattenimento, bensì un coinvolgimento del lettore che vuole essere non esclusivamente razionale, ma anche emozionale ed estetico, la sollecitazione di una partecipazione attiva e felice, da parte dei bambini, a quel che è rappresentato nel libro, di contro a un'idea della lettura come esperienza passiva e anche dolente, e come acritico assorbimento del contenuto proposto. Per Comenius, questo tipo di eccitazione e motivazione era possibile grazie alla presenza, nelle pagine di un libro, delle immagini, oltre al testo. Le parole, da sole, non agganciano il lettore, una constatazione che, nell'editoria per l'infanzia, ritorna sia nella *nonfiction* che nella stessa *fiction*, se è vero che il primo grande romanzo per bambini, *Alice nel paese delle meraviglie* (1865) dichiara già dalla prima pagina, per bocca della protagonista, la noia per letture non arricchite dalle figure. Prima di *Alice*, uno dei primissimi romanzi non per l'infanzia, ma comunque interessati a rappresentare la psiche infantile, *Jane Eyre* (1847), aveva mostrato – anch'esso già nell'incipit – quanto possa essere importante, perfino salvifico, per un bambino, un libro arricchito da bellissime illustrazioni. In una casa in cui viene sistematicamente umiliata e maltrattata, la piccola Jane trova rifugio e conforto nel libro *A History of British Birds* (1821), di Thomas Bewick, lo stampatore inglese che all'inizio di quel secolo aveva inventato un metodo di incisione che consentiva disegni infinitamente più sofisticati e ricchi di dettagli di quelli che erano stati possibili fino ad allora nei libri. In quel volume, nelle sue immagini – un volume e delle immagini *nonfiction* – Jane sprofonda e, rapita dalla precisione e bellezza degli uccelli e dei paesaggi raffigurati, dimentica la sua misera esistenza e si sente per un attimo felicemente appartenente all'universo, anziché sradicata e sola al mondo.

Dagli studi delle scienze cognitive oggi sappiamo che le immagini attivano una specifica parte del nostro cervello, l'emisfero destro, il quale, interagendo e integrandosi costantemente col sinistro, sembra comunque il principale responsabile delle emozioni, dell'empatia, della partecipazione, della connessione profonda con ciò che stiamo guardando³¹. Il linguaggio verbale, anche quello scritto, specie se usato per spiegare, analizzare, definire, argomentare in modo logico, attiverrebbe invece maggiormente l'emisfero sinistro, la cui funzione è quella di razionalizzare, distinguere, e distinguere prima di tutto noi dal resto dell'esistente. In questa prospettiva, un libro informativo che si presenti riccamente e magistralmente illustrato rappresenta uno stimolo interessante, teoricamente capace di coinvolgere i nostri due emisferi simultaneamente e di fornirci quindi un'esperienza profondamente integrata. Combinando parole e immagini, ci istruisce sulle cose del mondo, un processo per cui è necessario un qualche distacco, ma non manca di farci sentire anche, contemporaneamente, parte di esso, proprio come accade a Jane Eyre bambina.

Oltre alle illustrazioni, ci sono anche specifiche qualità del testo scritto che

³¹ I. McGilchrist, *The Master and His Emissary. The Divided Brain and the Making of the Western World*, Yale, Yale University Press, 2009.

contribuiscono a coinvolgere il lettore in modo più profondo rispetto a quello reso possibile da un linguaggio strettamente logico, lineare, apparentemente oggettivo, asettico. Le forme poetiche del discorso, per esempio, con le loro musicalità, assonanze, rime, onomatopée, ellissi, possono costituire scelte estetiche passibili di coinvolgere il lettore da un punto di vista anche sensoriale e emozionale. E queste forme sono diventate fin da molto presto parte integrante dei libri di istruzione, se solo pensiamo ai primi *rhyming alphabets* di ambito anglosassone, per esempio. Scopo di questi alfabetieri, il più famoso dei quali è ritrovabile all'interno del *New England Primer* pubblicato da Benjamin Harris alla fine del Diciassettesimo secolo, era quello di insegnare ai bambini a leggere e, insieme a ciò, di istruirli in materia religiosa attraverso versi rimati («In Adam's Fall / We sinned All») che risuonano rigidi e pedanti ai nostri orecchi. Ma la percezione che fosse necessario 'piacere' ai bambini attraverso una lingua che era frutto di una qualche ricerca estetica perché l'insegnamento avvenisse efficacemente era già presente in questi primi, semplicissimi esempi di libri didattici. E forse perché si compongono di pochissime parole, scelte accuratamente perché si possano dare rime, assonanze, allitterazioni, sinestesie e altri tipi di frizioni sonore e al contempo semantiche, gli alfabetieri e i *concept books* per giovanissimi lettori e per bambini pre-lettori sono i libri che ancora oggi continuano a presentare, spesso, una squisita qualità poetica, con picchi di creatività e ingegnosità straordinaria in certi titoli recenti. A livello internazionale, alcuni esempi possono essere *Imagier des gens* e *Saisons*, entrambi dell'autore e illustratore francese Blexbolex, pubblicati da Albin Michel rispettivamente nel 2008 e 2009. Apparentemente due opere semplici e didascaliche, che associano in ogni pagina singola un disegno ad una parola (relativa ai diversi tipi di persone e agli elementi propri delle varie stagioni), in realtà sono libri molto sofisticati perché costruiti senza mai imporre l'associazione tra un termine e il suo referente visivo in modo deterministico, o in qualche modo prevedibile e scontato. Ogni accoppiamento è sorprendente, imprevisto, aperto a molte possibili interpretazioni, dialogante in modo significativo con il nome e l'immagine della pagina accanto e insomma concepito per far nascere un ragionamento, delle domande, dei dubbi rispetto alle denominazioni/classificazioni accettate o più comuni delle cose del mondo. Tra gli alfabetieri che possiamo definire poetici, non creati solo per insegnare le lettere, ma anche per deliziare e sfidare il lettore, *ABCD* di Henry Galeron, pubblicato da Editions des grandes personnes nel 2017, raffigura gruppi di oggetti e esseri viventi i cui nomi iniziano con la stessa lettera all'interno di paesaggi surreali, o che sembrano tali proprio per la presenza in essi di questi insoliti accostamenti, mentre *Hoje sinto-me* della portoghese Madalena Moniz, edito da Orfeu Negro nel 2014, si presenta come un originale alfabeto dei sentimenti che sceglie con cura parole non comuni e mette in scena raffigurazioni metaforiche delle stesse. Erede invece più diretto degli alfabetieri pubblicati nel Diciassettesimo secolo, perché costruito come quelli sulla base di rime, assonanze, musicalità – però

esibite con un grado molto maggiore di sofisticazione – è per esempio *Alphabet des Plants et des Animaux* di Emilie Vast, uscito per i tipi di Memo nel 2014.

Non solo uno stile del testo espressamente poetico (musicale, rimato, metaforico...), ma anche uno stile narrativo può possedere un potere di attrazione maggiore di quello di una fredda esposizione di nozioni, cifre, fatti, spiegazioni, o informazioni. E nella storia dell'editoria divulgativa per l'infanzia troviamo molto presto esempi di libri scritti con vivaci toni narrativi. Gli esempi più classici sono i libri di viaggio, per esempio, tra i primi, i *Travel Books of Peter Parley*, una serie molto popolare pubblicata negli Stati Uniti da Samuel Griswold Goodrich (1793-1860). In questi libri i protagonisti compiono viaggi in paesi lontani – soprattutto europei – e ne descrivono le caratteristiche e le usanze. Dato il grande successo dei *Peter Parley Books*, per tutto il Diciottesimo secolo seguirono, da parte di altri autori ed editori, molti altri esempi di libri di viaggio simili, nei quali personaggi inventati (spesso famiglie con bambini) viaggiavano e approfittavano dei loro incontri con popoli, usanze e paesaggi per istruire i giovani e impartire loro lezioni di vario tipo (botanico, politico, culinario, morale, ecc.). In Europa, e in particolare in Francia, determinante per la diffusione delle conoscenze scientifiche fu l'editore Hetzel, con il suo *Magasin d'éducation et de récréation*, rivista nata dall'idea esplicita che fosse necessario trasformare la scienza da un insieme di aridi fatti in qualcosa di più attraente e avventuroso. Non a caso, Hetzel fu anche l'editore dei romanzi di Jules Verne, romanzi che, pur appartenendo allo scaffale della *fiction*, di fatto ruotano tutti intorno a precise conoscenze o ipotesi scientifiche e tecnologiche. Il bilanciamento tra istruire e dilettere, che aveva visto una prevalenza del codice testuale e di un approccio razionalistico nel Secolo della Ragione, inizia dunque in generale, nel Diciannovesimo secolo, a propendere anche nella *nonfiction* verso un tipo di comunicazione più coinvolgente dal punto di vista della possibilità anche di immaginare, nonché del piacere estetico. Questa tendenza viene via via esaltata dai progressi tecnologici che consentiranno, dai primi anni del Novecento, l'inserimento di illustrazioni a colori.

Lo stile narrativo è entrato a far parte della divulgazione – dando vita a un inevitabile intreccio tra informazione e immaginazione, *fiction* e *nonfiction* – non solo attraverso i libri di viaggio, ma anche attraverso un altro tipo di libro: le biografie. Le biografie per l'infanzia, in particolare, hanno sempre trattato per lo più di persone le cui vite sono considerate esemplari: inizialmente le vite dei santi e dei re, e a seguire, in Occidente, quelle degli eroi greci e romani (sull'esempio di Plutarco) o di grandi personaggi nazionali, raccontate con una prospettiva spesso patriottica. È interessante notare come la libertà che l'utilizzo di una modalità narrativa consentirebbe agli autori non sia stata da questi quasi mai usata per ritrarre i propri personaggi in maniera stratificata e complessa, per esempio immaginandone i pensieri, gli stati d'animo, i turbamenti interiori. Nell'occuparsi delle vite di persone vissute tanto o tantissimo tempo fa spesso sono pochi i 'dati' a disposizione, che appunto potrebbero

essere colmati dalla scelta di raccontare immaginativamente e liberamente quelle esistenze approfondendone aspetti intimi, relazionali, ecc., per come li si possono ipotizzare. Con pochissime eccezioni, però, gli autori hanno per lo più concepito le biografie per l'infanzia come libri chiaramente e immancabilmente edificanti, col risultato di una inevitabile semplificazione – e dunque alterazione – della 'realtà', forse maggiore di quella che sarebbe conseguita a un uso spudorato dell'immaginazione. Anche se la gamma di individui di cui si è scelto di narrare si è ampliata via via enormemente rispetto ai titoli del passato, e oggi include sempre più uomini e donne che sono rappresentativi di categorie socialmente marginalizzate, comunque le biografie per bambini sono rimaste e restano essenzialmente agiografie, esaltazioni dei soggetti narrati, più che occasioni per riflettere sulla complessità e sulle idiosincrasie delle loro personalità (e dell'essere umano in generale), al contrario di quanto accade nelle biografie per adulti, il cui approccio è pieno di sfumature già dai tempi del famoso *The Life of Samuel Johnson* (1791), di James Boswell³². Se si vanno ad analizzare le biografie per bambini si può scoprire che non c'è di fatto nessuna differenza nelle intenzioni riscontrabili dietro un libro come *Famous Girls Who Have Become Illustrious Women: Forming Models for Imitation for the Young Women of England*, di John M. Darton, pubblicato nel 1864, e *Storie della buonanotte per bambine ribelli. 100 vite di donne straordinarie*, di Elena Favilli e Francesca Cavallo, pubblicato in Italia da Mondadori nel 2017. Entrambi i libri scelgono di raccontare le vite di donne ritenute esemplari nella forma di racconti brevi e aneddotici concepiti per essere di ispirazione per le bambine. Importa poco che il primo libro esalti le virtù della modestia, della pazienza e della mitezza, ritenute fondamentali per una donna nell'Ottocento, mentre le donne esemplari di oggi siano rappresentate come indipendenti, intraprendenti, energiche e ribelli. In entrambi i casi, un solo modo di essere donna viene presentato come quello giusto, in linea con le tendenze culturali dell'epoca in cui gli autori scrivono. Influenzate dalle rivendicazioni assolutamente legittime del movimento #metoo dei nostri anni, Favilli e Cavallo impongono alle lettrici un modello di donna ideale in modo assertivo, monolitico e indiscutibile, trascurando qualunque ricerca approfondita su quelle che furono le vere esistenze delle donne ritratte in queste biografie. *Storie della buonanotte per bambine ribelli* ha avuto infinite imitazioni: oggi le librerie pullulano di libri sulle vite di donne straordinarie perché volitive, intraprendenti, militanti o pionieristiche in certi ambiti. Quel che emerge da questo nuovo filone di biografie è un universo femminile che non consente eccezioni rispetto al modello di donna presentato come ideale. Rifiutando l'acquiescenza che ci si aspettava dalle donne nel passato, le eroine esaltate oggi, immancabilmente e fieramente combattive, avventurose, autonome, potrebbero far sentire

³² D.M. Wilms, *An Evaluation of Biography*, in Carr (ed.), *Beyond Fact. Nonfiction for children and young people*, cit.

sbagliate le bambine che non si riconoscono in esse, che non hanno lo stesso spontaneo temperamento, così come sbagliate dovevano sentirsi le lettrici tendenzialmente inquiete e indomite nell'Ottocento. Se consideriamo il loro stile comunicativo – assertivo, semplicistico, non dialogico nei confronti del lettore – queste nuove biografie per bambini, apparentemente all'avanguardia per i loro contenuti femministi, sono in realtà paragonabili ai libri per l'infanzia più vetusti, prescrittivi e ideologici (oltre che legati al genere) forse mai scritti: i cosiddetti *conduct books* inglesi, e in particolare i *conduct-books for girls*. Un'evoluzione dei più antichi *courtesy books* – che avevano lo scopo di istruire i figli delle famiglie aristocratiche nelle maniere di corte durante il medioevo – i *conduct books* si svilupparono nel Diciassettesimo e Diciottesimo secolo per istruire i figli dell'emergente classe media nelle regole del buon comportamento, con una netta distinzione tra i sessi. Ai nostri occhi questi libri sono estremamente datati, intrisi di ideologie e stereotipi superati, soprattutto per l'idea di una distinzione preliminare tra ciò che devono imparare i maschi e ciò che serve, per crescere, alle femmine (i libri erano specifici e diversi per gli uni e le altre). E tuttavia, le biografie di donne che hanno riempito le librerie del mondo occidentale in questi ultimi anni, intese a ispirare determinati comportamenti nelle bambine (e dichiaratamente, già dal titolo, rivolte solo a loro) nella loro essenza non si discostano molto da quelle pubblicazioni.

Oltre alle biografie e ai libri di viaggio, che fin dall'inizio han fatto uso di espedienti stilistici come il racconto, tipico della *fiction*, e oltre agli alfabetieri e ai primi libri di parole, che tipicamente includono, fin dai loro primi esempi, elementi propri della poesia, l'utilizzo di meccanismi narrativi e/o poetici può riguardare – e negli ultimi anni ha in effetti riguardato – tutte le sfere della *nonfiction*. Quando l'autore di un libro informativo sceglie deliberatamente di scrivere con uno stile personale, quando utilizza metafore, o descrizioni vivide, quando opta per la prima persona come voce narrante, quando pone direttamente domande al lettore, quando sceglie, per il testo del libro, o del titolo, un linguaggio ampiamente figurativo, lirico, originale, personale, siamo di fronte a strategie che, proprie da sempre della *fiction*, arricchiscono anche la *nonfiction*, rendendola una letteratura che andrebbe analizzata per i suoi elementi estetici non meno che per la sua accuratezza informativa.

Storicamente, la divulgazione per l'infanzia fece un enorme salto in avanti alla fine del Diciassettesimo secolo, quando le società si fecero sempre più industrializzate, razionalmente organizzate e scientifiche. I libri informativi per bambini e ragazzi iniziarono allora a occuparsi delle grandi invenzioni tecnologiche, con pubblicazioni come, in Inghilterra, *The Wonders of the Telescope* (1805) e *The Wonders of the Microscope* (1806). Questo tipo di libri ha avuto grande successo da allora in poi, ed è letteralmente esploso durante gli anni Cinquanta del Novecento, quando il lancio dello Sputnik da parte dei russi colse il resto del mondo – e specialmente gli Stati Uniti – di sorpresa e si

decise che le nuove generazioni in Europa e in America necessitavano di una maggiore conoscenza scientifica e tecnologica.

La tecnologia ha avuto un ruolo non solo in termini di contenuto, ma anche di produzione della nonfiction. Gli sviluppi nei metodi di stampa hanno infatti progressivamente consentito di mettere a punto un numero sempre maggiore di innovazioni nei libri di divulgazione, come l'inserimento di illustrazioni a colori finalmente posizionate nella pagina – e in ogni pagina – accanto al testo a cui erano riferite, anziché in sedicesimi a parte, dove erano raccolte tutte insieme. Il dialogo testo-immagini, con l'arricchimento in termini di stimolo cognitivo ed estetico che ne consegue per il lettore, poteva così farsi più reale. Negli anni Settanta si diffuse moltissimo l'utilizzo di immagini fotografiche, grazie anche all'immenso successo internazionale dei titoli pubblicati dall'editore inglese Dorling-Kindersley. Dedicata a vari aspetti del mondo naturale e artificiale, le pubblicazioni Dorling-Kindersley furono tra le prime, in ambito divulgativo, a capovolgere la proporzione di testo e immagini a favore di queste ultime, lasciando al codice verbale il ruolo di brevi didascalie esplicative poste a margine delle figure. Lo spazio dato alle immagini fotografiche all'interno delle pagine di fatto rivoluzionò l'uso del visivo, prima concepito come strettamente funzionale all'interno di un libro che, se di divulgazione, faceva affidamento soprattutto sul testo scritto per veicolare la propria informazione e il proprio significato. I volumi fotografici della casa editrice Dorling-Kindersley rappresentarono un primo passo nella direzione di quella che, alla fine del Ventesimo secolo e in particolare a partire dagli anni 2000, è stata definita da Nikola von Merveldt la «svolta pittorica» della nonfiction³³. Con questa espressione von Merveldt si riferisce a un rovesciamento di tipo non solo quantitativo, ma anche qualitativo, concettuale, filosofico, e più specificamente gnoseologico, del rapporto tra testo e immagini. «Questa svolta segna uno slittamento epistemico nella relazione tra testo e immagine, andando fondamentalmente a modificare il modo in cui la conoscenza è costituita, compresa e comunicata»³⁴. Come osserva von Merveldt, il fenomeno più interessante di questo cambiamento è stata l'esplosione, a livello internazionale, della produzione del *nonfiction picturebook*, cioè dell'albo illustrato di divulgazione. «Lo statuto privilegiato delle immagini nella trasmissione della conoscenza ha portato, nelle ultime tre decadi, ad una interessante convergenza tra la letteratura informativa e la forma del *picturebook*, risultata nella produzione di *picturebooks* informativi profondamente innovativi, spesso capaci di superare le distinzioni tra diversi media, generi e età»³⁵.

³³ N. Von Merveldt, *Informational picturebooks*, in Kümmerling-Meibauer (ed.), *The Routledge Companion to Picturebooks*, cit.

³⁴ *Ibid.*

³⁵ *Ibid.*

3. *Il nonfiction picturebook*

Come si evince dalla ricchissima letteratura critica su di esso, il *picturebook* costituisce una forma comunicativa specifica: è un libro multimodale unico, dotato di una propria grammatica, di proprie regole e di un proprio funzionamento. Il *picturebook* si fonda sull'attribuzione di significato – letteralmente, del proprio valore semantico – a tutti gli aspetti che lo compongono come libro, sia in termini di contenuto che di forma. In un *picturebook*, cioè, non solo il testo, ma nemmeno solo il testo e le illustrazioni, bensì ogni singolo aspetto – inclusi il formato, la copertina, la carta, i risguardi, gli elementi di paratesto – contribuisce a veicolare e potenziare ciò che il libro ha da dire. È questa ricchezza di elementi, considerati essenziali sia in sé stessi che nell'orchestrazione che richiedono, a rendere il *picturebook* un'opera estremamente stimolante e complessa. La necessaria armonizzazione di testo scritto, illustrazioni e grafica all'interno di ogni doppia pagina, nonché di tutti gli altri elementi formali e materiali del libro, spinge infatti ad una costante ricerca di equilibrio e dialogo fra le sue varie parti, il che lo rende un'opera inevitabilmente stratificata, vibrante e aperta, sia in termini creativi (per chi lo concepisce) che ermeneutici (per chi lo legge/osserva). Ogni *picturebook* riuscito contiene molti livelli di significato e lascia spazi di interpretazione che è il lettore a dover riempire. Nel caso della *nonfiction*, optare per la forma del *picturebook* ha dunque significato, dall'inizio degli anni Duemila, dare sempre più spazio ad aspetti materiali, paratestuali, grafici, visuali, il che ha contribuito a cambiare radicalmente il modo in cui la conoscenza è concepita e trasmessa ai bambini. I *nonfiction picturebooks* condividono con i *picturebooks* narrativi gli stessi meccanismi, i loro autori operano all'interno della stessa grammatica, cioè considerano e concepiscono il libro come un oggetto in cui ogni cosa conta per comunicare il sapere che si vuole condividere con il lettore. Gli elementi fisici (formato, dimensioni, tipo di carta), gli elementi strutturali (titolo, copertina, risguardi, indice, paratesti), gli elementi grafico-pittorici (il font, la paletta dei colori, le illustrazioni vere e proprie, lo stile compositivo della pagina), sono tutti cruciali, insieme al testo, alla creazione dell'opera e parte integrante del contenuto e del significato che si vuole veicolare con essa. Al punto che, in casi estremi, il *nonfiction picturebook* può fare anche felicemente a meno del codice verbale, può non contenere parole, ed essere comunque a tutti gli effetti un libro di divulgazione (si vedano, per esempio, *Avant Après*, o *Dedans Debors*, di Anne-Margot Ramstein e Matthias Aregui, libri rispettivamente sul concetto di tempo e su quello di spazio, pubblicati nel 2013 e 2017 da Albin Michel).

Ma anche in tutti i titoli in cui un testo esiste, nel *nonfiction picturebook* il ruolo del codice visivo non è né semplicemente decorativo né meramente funzionale a sollecitare una risposta estetica nel lettore, parallela alla risposta cognitiva presumibilmente attivata dal codice verbale. In questo tipo di libro le immagini contribuiscono anche e soprattutto ad organizzare e arrangiare

all'interno della pagina il contenuto informativo, e ad interpretarlo e presentarlo secondo quelli che sono i propri codici. Come scrive Nikola von Merveldt paragonando i *nonfiction picturebook* nati a partire dagli anni Duemila alla *nonfiction* di tipo tradizionale, «le illustrazioni nei *picturebook* informativi non sono lì solo per documentare o illustrare i fatti (spiegati come tali dal testo scritto): esse li organizzano e li interpretano visivamente a proprio modo»³⁶. Di fatto, il contenuto di questi libri risulta inevitabilmente rivoluzionato, se paragonato a come veniva presentato nella *nonfiction* tradizionale, soggetto com'è all'«idea visiva» da cui l'opera, considerata come progetto artistico globale, si è originata. Tipicamente, il *nonfiction picturebook* è infatti, appunto, prima di tutto un progetto editoriale composito e stratificato, un'impresa creativa, oltre che informativa, nella quale gli aspetti estetici sono portatori di un autentico valore gnoseologico. Al suo interno, la conoscenza si presenta come una dimensione potenzialmente aperta, dialogica, che non può prescindere da un'attenzione sensoriale, da un'operazione inferenziale, da un'attività anche intuitiva, comparativa, interrogativa, anziché essere un insieme di nozioni da trasmettere e da apprendere meccanicamente. Si possono fare alcuni esempi concreti di questi libri divulgativi innovativi, partendo dal volume *Zooptique*, dell'autore e illustratore francese Guillaume Duprat, pubblicato da Gallimard nel 2013 e tradotto in tantissimi paesi. Argomento del libro è la vista in diverse specie animali e, più filosoficamente, la relatività di ogni specifico modo di vedere il mondo. Un simile tema non avrebbe potuto essere affrontato in modo altrettanto efficace e convincente se il libro non fosse stato pensato e realizzato come una stupenda galleria di ritratti animali sui cui occhi sono state poste delle alette che, aprendosi, mostrano al lettore che cosa vede, di un determinato paesaggio, quell'animale. La scena che si nasconde sotto le alette poste all'altezza degli occhi è in teoria la stessa, pagina dopo pagina, ritratto dopo ritratto, ma è anche sempre differente, dato che corrisponde al modo in cui si manifesta ad ogni specifico sistema oculare, che il lettore può fare proprio, decentrandosi da sé, ogni volta che «guarda» ciò che vede un cane, un gatto, una scimmia, un'aquila, uno scoiattolo, un'ape. Un altro libro che ruota intorno a un'idea visiva, cioè a un progetto prima di tutto artistico, è *Zoologique*, di Joëlle Jolivet, pubblicato in Francia da Seuil nel 2002. Al suo interno l'autrice e illustratrice raggruppa arbitrariamente animali appartenenti a categorie tassonomiche tra loro non relazionate, che possono però stare insieme in virtù di un qualche comune denominatore: una pelliccia a strisce, o a macchie, o bianca e nera, il fatto di abitare in un habitat freddo, caldo o temperato, di vivere in un ambiente acquatico, o nel sottosuolo, ecc. Posti vicini a seconda di criteri soggettivi, più che rigorosamente scientifici, ma comunque «veri» e spesso immediatamente evidenti, questi animali sono sistemati abilmente all'interno di

³⁶ *Ibid.*, p. 254.

doppie pagine surreali che finiscono per somigliare a tanti ipnotici e immensi puzzle (il formato del volume è gigante), dato che i corpi sono tra loro armoniosamente combinati, come fossero uno con l'altro quasi incastrati. L'urgenza comunicativa dell'autrice e illustratrice è chiaramente di tipo percettivo e compositivo, più che rigorosamente classificatorio: gli animali (tantissimi animali di tutte le specie del nostro pianeta) sono messi insieme sulla base di ciò che colpisce i nostri sensi e di quanto bene stanno all'interno di un armonioso *pattern*, e questo porta comunque a inaspettate e stimolanti associazioni, o domande, su di essi, il che costituisce un modo non meno efficace di un altro per avvicinare l'infanzia al mondo animale. Anche il volume *A Toute Vitesse!* dell'artista francese Crushiform (pubblicato da Gallimard nel 2013) raggruppa in ogni pagina esseri umani, animali e oggetti artificiali che non hanno tra loro alcuna connessione scientifica, nè apparente. La loro caratteristica comune è, in realtà, la velocità con cui si muovono nello spazio, a partire da ciò che va più lento via via fino alla velocità della luce. Così troviamo, disposti nella stessa pagina, un cavalluccio marino e una tartaruga delle Galapagos (0,3 km/h) o, più avanti, una lepre, uno yacht Sessa C68, un cane levriero, un carro armato Leclerc, un cavallo da corsa e il treno a vapore Orient-Express (70 km/h), o ancora, il proiettile di una pistola e il pianeta terra in rotazione su se stesso (1700 km/h), e così via. A volte due, a volte tre, a volte tanti elementi e a volte solo uno, tutti disegnati nello stile tipico dei poster pubblicitari degli anni Venti ed elegantemente bilanciati nell'equilibrio compositivo proprio di ogni pagina, che così diventa una pagina grazie alla quale scopriamo dati fattuali (di una precisione peraltro rigorosissima, rispetto agli oggetti ritratti e menzionati), ma che potremmo attaccare alla parete per la sua bellezza grafica, in linea con l'intenzione dell'autrice di realizzare un oggetto di grande sofisticazione estetica, oltre che un libro di divulgazione per l'infanzia. Un altro esempio di questa modalità complessa, multimodale e spesso ingegnosa di comunicazione della conoscenza, tipico del *nonfiction picturebook* dei nostri giorni, è il volume tedesco *Meister der Tarnung. Überlebenskünstler in der Tierwelt*, di Annika Siems, pubblicato da Gestenberg nel 2012. Poiché il tema che vuole trattare è il mimetismo animale, l'autrice e illustratrice in modo molto originale ed appropriato 'nasconde' tra le immagini la descrizione scritta di come i vari animali si mimetizzano, inserendo il testo dentro le illustrazioni (lungo la corteccia di un albero, tra le fronde, nelle macchie di un sasso, ecc.) in modo tale che il lettore è costretto ad aguzzare la vista, a cercare con attenzione, a non guardare in modo superficiale, per poterlo individuare e leggere. In questo modo, si ottiene un'esperienza di prima mano del fenomeno del mimetismo: il design del libro consente infatti di comprenderlo attraverso i sensi, oltre che con l'intelletto, come concetto solamente astratto. Il bambino deve trovare, come accade in natura, qualcosa che a prima vista non si vede. Così, la conoscenza in questo libro si acquisisce più che mai attraverso il coinvolgimento attivo del lettore, anziché come passiva assimilazione (ci sono pure

diversi tipi di testo scritto, stilisticamente e graficamente parlando, alcuni più facili da individuare, e con poche nozioni semplici da capire, altri scritti con font molto piccolo e spiegazioni più complesse, dunque più difficili sia come contenuto che come mimetismo, per lettori di età diverse o con diversi gradi di passione esplorativa, nonché per lo stesso lettore che può tornare più e più volte al libro e non finire di scoprire quello che ha da dire).

Anche se i *nonfiction picturebooks* a volte presentano un'appendice finale che riassume l'argomento di cui trattano in modo più tradizionale (ritroviamo tutte le velocità elencate in fila, e una breve descrizione dei vari oggetti rappresentati solo pittoricamente nelle pagine, alla fine di *A Toute Vitesse!*, per esempio), la forza sia estetica che semantica di questi libri risiede soprattutto nella bellezza e nell'estro delle loro pagine più deliberatamente creative, espressive, evocative, concepite per mescolare – e non dissociare – informazione e sollecitazione sensoriale, fatti/dati relativi al mondo e loro artistica rappresentazione³⁷. In altre parole, i *nonfiction picturebooks* suggeriscono un approccio alla conoscenza che fonde programmaticamente la dimensione estetica con l'esperienza di apprendimento, una direzione, questa, che i libri di divulgazione per l'infanzia hanno intuito di dover percorrere fin dall'inizio della loro produzione, che nel corso dei secoli hanno messo a punto con momenti ed esempi di maggiore o minor successo, ma che gli editori di tutto il mondo ora stanno esplorando e sfruttando con grande consapevolezza e convinzione, grazie alle possibilità offerte da un nuovo tipo di medium. Facendo della ricerca stilistica/artistica la sua principale caratteristica espressiva, il *nonfiction picturebook* punta a organizzare l'informazione in modi originali, non convenzionali, talvolta irriverenti, spesso sorprendenti, comunque coinvolgenti per il bambino lettore, che è invitato, dalla complessità stessa del libro, a guardare attentamente, a collegare, a trovare, a interpretare, a farsi domande, a rispondere attivamente, con i suoi sensi e i suoi ragionamenti, alle sfide conoscitive poste in essere da un'opera che, nella sua multimodalità strutturale e intenzionale, è per sua natura «aperta»³⁸.

³⁷ K. Mallan, A. Cross, *The Artful Interpretation of Science Through Picture Books*, in Id. (ed.), *Picture Books and Beyond*, Primary English Teaching Association Australia, 2014.

³⁸ G. Grilli, *The artistic nonfiction picturebook*, in N. Goga, S.H. Iversen, A.S. Teigland (edd.), *Verbal and Visual Strategies in Nonfiction Picturebooks. Theoretical and Analytical Approaches*, Oslo, Scandinavian University Press, 2021; Ead. (ed.), *The New Nonfiction Picturebook. Sharing Knowledge as an Aesthetic Experience*, Pisa, ETS, 2020.

Conclusioni

Dagli anni Duemila, la sperimentazione che combina nuovi tentativi di comunicare il sapere con la forma dell'albo illustrato ha insomma riempito gli scaffali di alcuni tra i più innovativi esempi di quella che possiamo a tutti gli effetti chiamare un tipo di 'letteratura' per l'infanzia. All'interno di questa letteratura, capace di intrecciare linguaggi, confondere confini, mescolare i concetti stessi di *fiction/nonfiction*, informazione/arte, istruzione/divertimento, la conoscenza è un'avventura o comunque un'esperienza anche estetica, integrata, potenzialmente appassionante, in fondo non diversa da quella della scienza nel suo farsi³⁹, quando – attraverso l'uso dei sensi, l'osservazione minuziosa, la capacità inferenziale, la propensione a porsi domande, a trovare collegamenti, ad avanzare ipotesi, a fare ragionamenti – si appresta a scoprire le cose che poi diventeranno oggetto del nostro sapere.

³⁹ M. Zarnowski, S. Turkel, *How Nonfiction Reveals the Nature of Science*, «Children's Literature in Education», n. 44, 2013, pp. 295-310.

From image anxiety to image turn: the commencement of graphic narrative in Chinese children's literature

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ABSTRACT: There is a profound image anxiety in the children's education in ancient China. The entertainment and bionic nature of images are considered harmful to children's growth, picture books are therefore strictly restricted for children to access. This image anxiety had gradually changed with the process of visualization in modern Chinese society. Children are able to construct the legitimacy of viewing in a new cognitive paradigm, carry out their own visual practice, and establish a connection between viewing and knowing. The commencement and development of graphic narrative is a key step. It is accompanied by the renewal of image concepts and graphic narrative methods. Out of respect for the unique attributes of children's vision, such as subjectivity, Chinese children's literature graphic narrative has opened up a visual field full of imagination, enriching Chinese modern and contemporary visual culture. The emergence of graphic narration in children's literature has become the embryo of picture book in Chinese children's literature, and an indispensable link in the history of Chinese picture books before their development. It has experienced a special historical development process, absorbed western cultural resources, and broken through the shackling of tradition.

EET/TEE KEYWORDS: Chinese children's literature; Graphic narrative; Image turn; History of visual culture; Picture books.

Introduction

In ancient China, traditional children's education was marked by a taboo on images. Since the May Fourth Movement, Chinese modern children's literature, with a child-centered approach as its distinct banner, has been reconstructing children's sensory experiences, providing a field for the process of children's subjectification, dismantling various moral educational barriers

before children, and liberating children from the position of passive cultural appendages.

Since its inception, Chinese children's literature has placed great emphasis on the use of images, which is closely related to the development of an image society. The emergence of modernity has elevated the importance of visuality. Visuality has also gradually freed itself from the suppressed status of 'divine encounter' and 'heart understanding' in traditional Chinese society through scientific discourse, enhancing its significance as a sensory cognitive mode. The meaning of the observer and new observational positions are becoming an undeniable force in modern culture and society.

The extensive role of visual culture in the early stages of modern Chinese society has profoundly influenced the process of children's visual modernity, with the influx of various images leading to the democratization of children's visual experiences.

The emergence of various news pictorials became a boon for children, but these were not cultures belonging to children. For Chinese children, the uniqueness of their own visual experiences and desires was emphasized during this period, and the emergence and development of children's literature was a key link. In early children's literature, in addition to illustrations, covers, and other paratexts, new types of image texts such as picture stories, fable illustrations, and comic drawings also emerged, demonstrating distinct narrative characteristics. These graphic narratives in children's literature have opened up new fields of visibility for children, providing many possibilities for children to become modern subjects of observation.

1. *Image anxiety in early Chinese children's literature*

«What could we read at that time? Any book with even the slightest picture would be banned, scolded, or even spanked by the tutor, who was the 'senior who guided the youth' at that time»¹. Many modern and contemporary writers, represented by Lu Xun, recorded in their memoirs their love for pictures in childhood and the sadness of being banned from looking at pictures by their elders. This kind of anxiety about children's images has a long history in traditional Chinese culture. Even in the Ming Dynasty, when the printing and publishing industry was relatively prosperous, when the ancient prose master Chen Jitai was caught looking at the Romance of the Three Kingdoms as a child, he hurriedly explained «I was not looking at the pictures, but the words under the characters»². It can be seen that children who are unmoved by im-

¹ Lu Xun, *ZhaoHua Xi Shi*, Beijing, Beijing Education Press, 2019, p. 22.

² Chen Jitai, *Dai Yi Shan Fang*, Shanghai, Shanghai Bookstore Press, 2001, p. 119.

ages are more in line with the traditional moral principles of eliminating selfish desires and not looking at inappropriate things.

In the classical Chinese paintings of *Hundred Children* and *Lessons*, unlike the traditional «painting within a painting», the scrolls held by the children in the paintings are often blank (Pic. 1). These ‘paintings without paintings’ showed that in the context of traditional education, adult painters cannot even imagine what images can appear harmoniously and legally with children. As viewing objects, children’s viewing is empty and incomplete. The long-standing image anxiety of children in Chinese culture had its institutional conditions and psychological motivations. Yan Yan-



Pic. 1. Wang Lian hai, *Chinese Ancient Children's Play Modeling Atlas*, Jiangxi, Fine Arts Publishing House, 1999, p. 33

zhi once gave three interpretations of ‘picture’: «The first is the picture of reason, which is the hexagram. The second is the picture of knowledge, which is the study of letters. The third is the picture of pictures, which is paintings»³. In ancient China, the types of images provided by adults for children were mostly «picture of reason» and «picture of knowledge». The former, such as *Yixue Qimeng Yichuan* and other classics that introduce pictographic symbols, and the latter, such as the illustrated literacy book *New Edition of Four Words of Couplets*, mostly did not go beyond the scope of picture studies such as illustrations and diagrams. There are very few artistic paintings created for children, and the content is concentrated on portraits of sages and records of filial piety, such as Tao Zanting’s *Mengyang Tushuo* in the Ming Dynasty and Shen Sansheng’s *Yangzheng Tushuo Chubian* in the Qing Dynasty. Folk pictures for New Year are also a rare image resource for children. In the Daoguang period, Li Guangting’s *Xiangyan Jiayi* recorded: «Papering New Year pictures is just a child’s play. However, for example, ‘Filial Piety Picture’ and ‘Farming Busy’, let the children look at them and explain them, which is also a way to cultivate morality pictures are all about admonitions and warnings, and they show the rise and fall of the world. After thousands of years, we can learn

³ Shen Zicheng, *A Compilation of Masterpieces on Painting Throughout the Ages*, Beijing, Cultural Relics Publishing House, 1982, p. 34.

from the pictures»⁴. It can be seen that the visual representation of ancient Chinese graphic narrativeness is often the embodiment of religious propaganda, Confucian ethics, and social education.

However, even images that serve Confucian ethics education are still inferior to texts. Wang Chong believed that «people like to look at pictures, but the pictures are of the dead in ancient times. How can compare to seeing the dead's face with watching his words and deeds»⁵? In the relationship between pictures and texts in the traditional context, texts have an absolute advantage, while images are suppressed because of their own attributes, especially visual pleasure.

In traditional Chinese culture, the highest and most sacred knowledge is often obscure and hidden. There is a hierarchy between sensory perception and intellectual thinking. As Zhu Xi summarized the three methods of learning in *What Children Should Know*: heart, eyes and mouth, and pointed out that «heart is the most urgent»⁶ among the three methods, traditional education expects children to achieve a deep understanding of the highly abstract philosophical thinking of the world through introspection. The examination method of the imperial examination system also made recitation the main method of acquiring knowledge. Controlling children's vision and focusing it on books was an appropriate measure under this examination system. «When reading a book, one's eyes should be focused on the book and not look at anything else»⁷. «Reading and playing in the market, with eyes on book bags and boxes»⁸. and so on are the qualified visual standards for children. There are also strict restrictions on the books that children can read, and often «non-Confucian books should not be allowed to read»⁹. Since the Qin and Han dynasties, ancient primers have focused on the rhyming arrangement of Chinese characters, which has also cultivated a learning model of speaking, listening, and memorizing. Cui Xuegu said in *You Xun* that «only use the mouth and ears, not the heart and eyes, no matter how smart the students are, they will be taught dozens of times, and even when the teacher stops talking, the students will be silent»¹⁰, which reveals the shortcomings of this

⁴ Zhou Xinhui, *Outline of the History of Ancient Chinese Prints and Paintings*, Beijing, Beijing Joint Publishing Company, 2018, p. 2339.

⁵ Wang Chong, *Lun Heng*, Shanghai, Shanghai People's Publishing House, 1974, p. 24.

⁶ Zhu Xi, *Zhu Zi Quan Shu*, Shanghai, Shanghai Ancient Books Publishing House, 2002, p. 367.

⁷ Tu Xishi, *The Rites of the Child*, Shandong, Democracy and Construction Press, 2019, p. 11.

⁸ Zhou Xingsi, *Thousand Character Essay*, Beijing, Beijing Children and Youth Press, 2023, p. 1.

⁹ Wang Yunwu and Yao Mingda, *New Chinese Celebrities' Annals Integration*, Taiwan, Taiwan Commercial Press, 1982, p. 14.

¹⁰ Chen Yuanhui, *opium war period education*, Shanghai, Shanghai Education Press, 2007, p. 384.

learning model. Ming Enpu recorded the learning scene of the old Chinese school as follows: «Let's assume that the text to be memorized is a passage in the Analects about teacher habits: 'Buying wine and buying dried meat, do not eat. Do not remove ginger from food, and do not eat too much.' Students who are not familiar with this passage recite it like this: 'Buying wine... selling wine... wine... wine... wine... wine... buying dried meat, buying dried meat... buying dried meat... do not eat. Do not eat... do not eat... do not remove... do not remove... do not remove... ginger, ginger... ginger...»¹¹. This learning method trapped scholars in the constraints of classics. With the support of power, dogmatic knowledge became the mainstream of education. Children expressed their submission to the royal power through copying and reciting as soon as they entered school. Therefore, in ancient times, the most suitable extracurricular reading materials for children could not be picture books, but the classics and history books such as *Tuyuan Cefu* and *Kongzi Beiwenshu* that were easy to imitate, and these would undoubtedly become text decorations for picking out sentences.

In addition to images, toys that cater to children's viewing interests are even more morally inferior. Since the Han Dynasty, Wang Fu denounced children's toys such as «mud carts, clay dogs, horse rides, and singing and dancing» as «useless tricks»¹². After that, the moral requirements for children's viewing ethics became more and more stringent. Zhu Xi annotated «Do not look at what is not proper» as «what is not proper is your own selfishness»¹³, expanding the norms of viewing principles to the negation of individual visual desires.

2. Historical changes in China's understanding of images

For Chinese children, the legitimacy of image viewing has been established since the rise of the cognitive paradigm of the late Qing Dynasty. Since the abolition of the imperial examination system, traditional education has been constantly impacted by new knowledge. «Open your eyes to see the world» – this visual metaphor shows the way of thinking of modern Chinese people of insight to form a correct understanding of the world through observation. In the early winter of 1910, teacher Zhou Shuren found that students lacked imagination for modern new things, so he led students from Shaoxing Prefecture Middle School to visit the Nanyang Industrial Exposition. «They took a ship

¹¹ Ming Enpu, *Life in the Chinese Countryside*, Beijing, Current Affairs Publishing House, 1998, p. 309.

¹² Zhang Jue, *QianFuLun*, Yuelu Shusha, 2021, p. 122.

¹³ Zhu Xi, *Four Books, Chapters and Sentences Collected Notes*, Zhejiang, Ancient Books Publishing House, 2014, p. 104.

and a train, saw roads, railways, electric lights, telephones, and saw famous local products and glassware at the exhibition. There was a dazzling array of things»¹⁴. When traditional teaching methods could no longer cover the endless new phenomena in modern society, «the teacher was a scholar with rich knowledge, but he could not leave the door»¹⁵. has become an outdated way of cognition, and observation is particularly important for understanding the world.

The change in cognitive paradigm since the late Qing Dynasty was first summarized as «Gezhi», which is a traditional Confucian theory, but it was re-proposed in the differential comparison between China and the West in the late Qing Dynasty. Zhang Shusheng's «Ge Zhi, Chinese seek truth, Westerners seek things... Those who seek truth, easy to talk about empty words»¹⁶, has discovered the cognitive blind spots of traditional Chinese «Gezhi». Therefore, the study of science and technology has gradually been given a new meaning. It is no longer a path of metaphysical thinking to «enter the realm of saints and sages», but a practical approach. Kang Youwei said during his travels in the West: «If our country talks about theories and literature in vain, focuses on the metaphysical and disdains the physical, the weakness of the country and the poverty of the people are all due to this»¹⁷. Behind the new interpretation of «the study of science and technology» is the fluctuation of the status of the metaphysical and the physical. The emphasis on 'instrument' has enhanced the importance of eye's observation in understanding the world. In *Diary of the Western Mission*, when discussing elementary schools in the West, Zeng Jize discovered the importance of observation in Western education: «Use a microscope to examine tiny objects to help the study of science and technology... From the small to the big, from the surface to the inside, from the useless to the useful, from the same to the different»¹⁸. The new educational purpose allows children to experience a reading revolution from sound to vision. Tao Xingzhi emphasized the importance of observation for children's learning in «Educational Research Method»: «The more you observe, the more you will feel things»¹⁹, so we should «liberate our eyes, break the colored glasses, and teach everyone to see the facts»²⁰. The reading revolution from chanting to silent reading in the late Qing Dynasty also shows that starting from reading,

¹⁴ Liu Xunhua, *The Beauty of Distress – Modern Student Life in the Great Turnaround (1901-1949)*, Wuhan, Huazhong University of Science and Technology Press, 2014, p. 68.

¹⁵ Global Society Editorial Office, *Picture Daily*, Shanghai, Ancient Books Publishing House, 1999, p. 27.

¹⁶ Zhu Youxuan, *Historical Materials of Modern Chinese School System*, Shanghai, East China Normal University, 1986, p. 358.

¹⁷ Kang Youwei, *Lieguoyouji*, Shanghai, Shanghai People's Publishing House, 1995, p. 109.

¹⁸ Zhong Shuha, *Diary of a Journey to the West*, HuBei, Yuelu Shusha, 1985, p. 2.

¹⁹ Tao Xingzhi, *The Law of Educational Research*, «Jin ling guang», vol. 5, 1918, p. 569.

²⁰ Id., *Democratic Education*, in *The Complete Works of Tao Xingzhi*, China Press, 1985, Vol. 3, p. 569.

modern Chinese children are consciously cultivated to be a subject of observation.

At this time, the more intuitive reproduction power of images than words made it an indispensable communication tool in this cognitive revolution. In children's books, the hierarchical transformation between the reproduction media such as classical Chinese, vernacular, and images began. In July 1903, the 53rd issue of «Education World» began to serialize Rousseau's *Emile* (*Emile's Ear Notes*). Rousseau reflected on the education of text symbols in his naturalistic thoughts and believed that in order to get rid of the shackles of the old culture, eye perception is better than verbal impression. He tried to rebuild the transitivity of language and restore the identity between what is written and what is seen, so he advocated that visual symbols such as images could also be included in literary creation. Fu Sinian also believed that «if you want to talk about the truth and the original meaning, just say it directly, such as the early Christian paintings. This is great literature»²¹.

Kang Youwei sighed when browsing Japanese books: «Looking at the details of Japanese elementary school textbooks and the exquisite pictures, their strength is not without reason»²²! In the face of images, which are increasingly important as a reproduction tool for translating the world, children's desire to watch is allowed under the cognitive method of «investigating things» and the educational purpose of spreading science. The emergence of children's pictorial magazines such as *Meng Xue Bao* and *Qimeng Pictorial* and new textbooks fully demonstrate the scientific education significance of images. In 1904, the Commercial Press absorbed the shares of Japan's Jingangtang, introduced five-color printing technology, and began to compile illustrated textbooks such as *The Latest Chinese Textbook*. Although the path to image freedom for Chinese children is still tortuous, the introduction of images into textbooks has become a general trend. In the 1920s, Wu Yanyin was dissatisfied with textbooks without pictures in *An Overview of Primary School Textbooks in my country since the Late Qing Dynasty* (originally published in «Tongxin Monthly» Volume 4, Issues 1-4): «There is a certain kind of high school Chinese textbook that has no pictures at all, which is really surprising»²³. Even in rural primary schools, Yu Ziyi recalled: «Only this natural scenery can never arouse the interest of rural primary school students in beauty»²⁴. And professional art decorations replace student scores in the classroom. In addition,

²¹ Fu Sinian, *Lectures on the History of Ancient Chinese Literature*, Anhui, Anhui People's Publishing House, 2019, p. 29.

²² Kang Youwei, *Japanese Bibliography*, in Jiang Yihua (ed.), *The Complete Works of Kang Youwei*, Book III, Beijing, People's University of China Press, 2007, pp. 408-410.

²³ Gao Song, *Ninety-five Years of the Commercial Press*, Beijing, Commercial Press, 1992, p. 217.

²⁴ Yu Ziyi, *Diary of a Village Primary School Teacher*, Shanghai, Commercial Press, 1927, p. 13.

the architecture of cultural spaces such as modern museums, art galleries, and children's exhibition halls has formed new ways of displaying images (splicing, surrounding, juxtaposition, etc.). The public domain of image viewing and the private reading space brought by image printing have promoted the widespread acceptance of modern images by Chinese children and strengthened the legitimacy of image dissemination.

The cognitive paradigm of connecting seeing and knowing allows children to no longer weave their impressions of the world based solely on literary words, but to use current experience as the starting point for grasping reality. Visuality is of great significance in the innovation of the relationship between 'words and things' at the turn of modern China. The emphasis on visuality has strengthened the transitivity of Chinese education. In order to express various new things since modern times, more words have emerged, and visuality has become an important part of the language revolution. This has broken the infinite cycle between the recitation and interpretation of classics, impacted the cultural tradition of historical word-centrism in textual research since the Qing Dynasty, and created new opportunities for cultural creation. In short, the new cognitive paradigm of viewing and grasping the world in a scientific way in the late Qing society is the key to breaking the image anxiety in traditional education, and it is also the starting point for Chinese children's literature to create modern visual representations in image texts.

In addition to being vigilant about the visual pleasure attributes of images, the reason why ancient China did not provide children with a large number of image texts is also due to the cognitive limitations of the relationship between children and images. In his study of *the dissemination and reception of images in the Ming Dynasty*, Clunas concluded that «scholars contemplate, while peasants (as well as women, children, and eunuchs) merely look»²⁵. «Only the lower social classes (women, children, eunuchs, and Mongolian princes) are unable to transcend figurative art, but are instead confused by what they see and imitate the behaviors (good or bad) depicted in it». As the saying goes, «If we judge paintings by their resemblance to form, our vision is similar to that of children». Traditional culture generally believes that children cannot interpret the metaphorical connotations between images and the world, but can only regard images as mirrors of objective reality, and may even be dazzled by the realism of the images in the images and directly accept them as the real world. Just as the ancients worried that «people in the market would knead clay to deceive children»²⁶, the ancients worried that the bionic nature of images would

²⁵ Ke Luge, *Images and Visuality in the Ming Dynasty*, Beijing, Peking University Press, 2011, p. 237.

²⁶ Ren Jigai, *Zhong guo he shi wen xue Qing dynasty wenzheng*, Beijing, Jilin People's Publishing House, 1998, p. 10.

cause children to fall into the illusion of not being able to distinguish between truth and falsehood.

In the early graphic narratives of Chinese children's literature, this ancient image anxiety was eliminated by giving children more subjectivity when facing images. In many stories related to painting, the relationship between children and images, and the life images in images, is repeatedly discussed. In these stories, children use animals' illusions of reality to achieve their own goals. Bao Ge'er in *Scare Away the Squid* carves a human face on a watermelon to prevent the squid from stealing again. In *A Clever Plan to Repel the Enemy*, Li Er draws a fake cat on the wall, making the vicious dog believe it and run into the wall and fall to the ground. *Toad Watching Paintings*, *Cloud Watching Mice*, *Cat and Moving Duck* and other stories follow the same story pattern. In these stories, children are no longer passive viewers, but masters of using images to create things. *The Dead Becomes Alive* tells how Huisheng turns two dead dogs lying on the ground in a painting into two running dogs by simply changing the lines. Li Gu also adds an ending to the story for the two dogs, «They want to run off the paper and chase the cunning wolf in the South Mountain»²⁷. The simulation of life through superb skills is an old topic in art history. The graphic narrative of children's literature has transferred this ability to create like a god to children. Children are no longer the recipients of image illusions, but the initiators. They know the boundary between illusion and reality, know how to manipulate life through simple lines, simulate and create reality outside of reality, become their own 'storytellers', and open up another function of images beyond the reproduction of the world: creating a new world.

In short, the image anxiety of Chinese traditional culture towards children mainly includes two parts. The first is the fear that the visual pleasure of images will erode children's minds. This has been eliminated by the educational purpose of using images to help children understand the modern world and scientific knowledge since modern times. The second is the doubt about the low level of children's image cognition. With the recognition of children's visual subjectivity, the function of images for children has also expanded. Children are no longer considered to be always trapped in the illusion of reality of images. Images also have independent values different from the objective world. Children can open up more imagination space through graphic narratives. The relationship between children and images is also becoming closer. «Pictures are the windows of children's hearts, pictures are the homes of children's emotions, and pictures are the language of children's cognition»²⁸ has become a new consensus on the relationship between children and images.

²⁷ Wang Chuan-fen, *The Game of Practicing Painting: Dead Becomes Alive*, «Children's World», n. 77, 1923, pp. 19-21.

²⁸ Chen Heqin, *A Study of Children's Psychology*, Beijing, Beijing Institute of Educational Science, 1983, p. 531.

3. «Minimum Expression Clues» and the development of graphic narratives in Children's literature

In ancient times, children regarded not showing their emotions on their faces as a benchmark for emotions. As the «raw material of sages and saints», all the celebrities and scholars in ancient biographies or memoirs were able to control their emotions and remain calm and confident from a young age. For example, Xia Yuanji said: «When I was young, I was always angry when someone offended me. I began to be patient on the surface and in my heart»²⁹. In addition, there are Wei Yuan, who was «seldom talkative and smiling since childhood», Lu Shanji, who was «dignified by nature», and Huang Daozhou, who was «quite calm in nature». This emotional norm is also reflected in literary and artistic works. Children, who exist as decorative or symbolic symbols, often cater to the aesthetic gaze of adults with static and stereotyped faces, and their expressions do not change significantly. In the classic story *Mencius Cuts the Loom* included in the Illustrated Biographies of Women (Pic. 2), although the image is the most dramatic scene of Meng's mother cutting the loom with a knife, the image narrative completely erases the emotional tension of «mother's anger» or «Mencius' fear» in this plot. Meng's mother's gentle and smiling face and the knife-holding posture seem contradictory. The author wants to write about the mother's strictness in educating her son, while also maintaining the ideal family scene of a loving mother and a filial son. In the end, in this



Pic. 2. Liu Xiang, Qiu Ying, *Illustrated Biographies of Women*, Bao's Zhibuzhuzhai printed in the 44th year of the Qianlong reign of the Qing Dynasty, quoted from *Ann Elizabeth Barrott Wicks Children in Chinese Art*, University of Hawai'i Press, 2002, p. 93

educational ritual with visual deterrence as the core, the children's fearful eyes are gradually faded, and the paranoid, violent, and panic-inducing side of traditional education is also obscured, leaving a rift between the image and the text.

The two pictures above (Pic. 3 and Pic. 4) are typical children in literati paintings. In this type of child images, the children's expressions are plain and detached. Their expressionless expressions store the desires of the viewers and dilute and eliminate the world-weariness of adult viewers.

Whether it is a picture of a baby playing or a artistic painting, the invisible expressions of children in tra-

²⁹ Zhang Jian, *Qian Jin Lu*, Xinjiang, Xinjiang People's Publishing House, 1995, p. 237.

ditional works make their emotions and demeanor look the same. However, the various picture stories that have appeared in Chinese children's literature since modern times are just the opposite. In their creation, they often magnify the expressions of the characters through exaggeration and deformation. This creative feature unveils the veil of tranquility and peace on the faces of children in literary and artistic works since ancient times, and produces narrative moments of destruction, manifestation and reconstruction.

In general, this creative technique is the use of «minimal expression clues». According to Gombrich's understanding, «minimal expression clues» are shapes similar to facial or facial expressions that can produce our instinctive psychological reactions. Gombrich believed that humans have cognitive and emotional instincts when looking at facial expressions, so the lines that combine to form expressions can turn any shape into an image with human life and existential significance. Rudolf Töpfer, known as the father of comic strips, said: «People who tell stories through painting only need one condition – to understand the facial features and facial expressions of the characters»³⁰. When combing through the emergence and development of image narratives in Chinese children's literature, we will find that this method has been used from the beginning (Pic. 5). *Minimum expression clues* can be traced back to the earliest children's comic book handout in China, *Children's Funny Painting Notes*. The author Pan Dawei has close ties with the Lingnan School of Painting and absorbed Western painting techniques to write this book. In this book, there are already many expressions composed of lines and free combinations of expressions and shapes. «The face is the part of the image that 'looks' back at the viewer, giving the illusion that the image has life and soul»³¹. The widespread use of painting techniques that use lines to reproduce facial expressions facilitates the descrip-

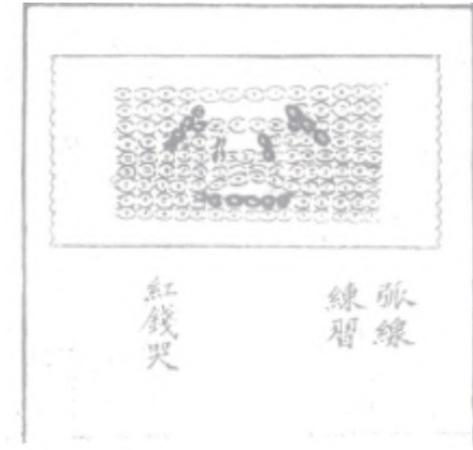


Pic. 3. Taipei National Palace Museum, Photo Catalog, SV-362. Quoted from Xiong Bingzhen, *Childhood Memories*, Guangxi Normal University Press, 2008, p. 208

Pic. 4. *Divine Infant*, Ren Bonian, *Ren Bonian's Painting Collection*, Vol1, China Nationalities Photography Art Publishing House, 2003, p. 70

³⁰ E.H. Gombrich, *A Psychological Study of the Reproduction of Art and Illusion Pictures*, Guangxi, Fine Arts Publishing House, 2012, p. 286.

³¹ W.J.T. Mitchell, *Meta-Image Images and Their Theoretical Discourse*, Shanghai, Shanghai People's Publishing House, 2023, p. 35.

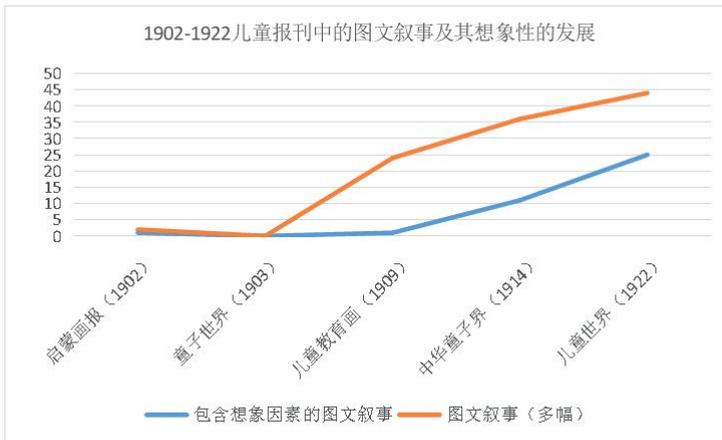


Pic. 5. Pan Dawei's, *Children's Funny Painting Post*, 1908, p. 9

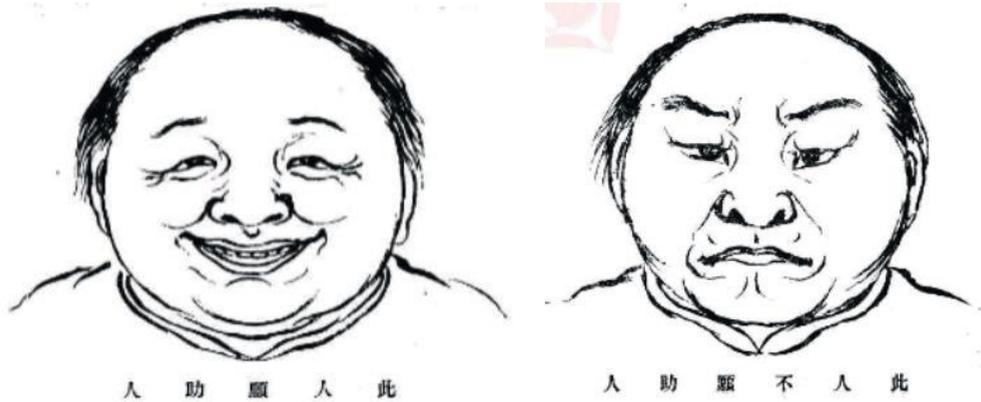
tion of personality in concise graphic narratives. For example, in the *Fuyou* Newspaper, two faces with the same face but opposite expressions are used to illustrate the personality traits of a kind and friendly person (Pic. 6) and a cold and stingy person (Pic. 7).

In addition to the character description in the narrative, «minimal expression clues» have special significance for children. They make everything in the image express human emotions and feelings. This is a concrete expression of children's view that everything has animism and the key to opening the door to children's imagination and creativity. In the embryonic period of children's literature from 1902 to 1922, a quantitative turning

point of imaginative graphic narratives appeared in *The World of Chinese Children*.



In many graphic narratives in *The World of Chinese Children*, the use of *minimal expression clues* makes its graphic narratives have the color of literary imagination. For example, in *Crows Come to Eat Persimmons*, insects gnawed the persimmons into the shape of human faces, causing the crows to flee in fear. *War in the Belly* anthropomorphized honey cakes and sesame cakes, and the simple facial features make the arrogance of honey cakes and the cowardice of sesame cakes vividly appear on paper. Child psychologists such as Charlotte Teler and Elsa Kohler have found that the phenomenon of «transitivism», in which children are easily assimilated to other people's emo-



Picc. 6-7. *Helping Others*, «Fu you Newspaper», n. 5, 1918, p. 12

tions, often occurs in children. «This temporary confusion between self-image and other people's image can be understood as a function of creating a healthy self, and «transitivism» plays an important role in children's picture and text reading. As mentioned above, the picture and text narrative of Chinese children's literature attaches importance to the application of «minimum expression clues» in the occurrence period. Through «minimum expression clues», the seemingly simple, primitive and concise lines in children's books have gained the life of the image, which creates an artistic environment for children's «transitivism». Therefore, the image text of Chinese children's literature also obtains its own meaning in the double gaze of children gazing at images and images gazing at children in turn.

In short, the use of «minimal expression clues» in graphic narratives has enriched the narrative expression methods of Chinese children's literature. Although the lines are simple and the shapes are simple, the expressions in the images of children's literature can convey emotions concisely and intuitively, calling for an empathetic experience that is close to the source of life and instinct. This experience has the power to penetrate across different cultures, ages, genders, and races, and fully demonstrates the «life of images» in Chinese children's literature.

4. *Western cultural resources in the narrative of Chinese children's literature*

Artistic illustrations in modern Chinese literature were influenced by the works of foreign artists such as Beardsley and Fukuko Honger. In the early days, graphic narratives in children's literature were also deeply influenced by foreign

graphic texts. The styles and contents of the works that children's literature writers borrowed from were very wide, including children's magazines, textbooks, foreign folk tales, religious illustrations, comic strips, etc. Researchers such as Zhang Mei have concluded that due to the lack of copyright awareness at the time, some of the images in *Children's World* and *Little Friends* borrowed content from foreign newspapers and magazines, so they showed a Westernized color. However, directly defining this appropriation as «hard transplantation» ignores the changes in meaning caused by the migration of context in the «journey of images» and the active acceptance and re-creation of Chinese authors.

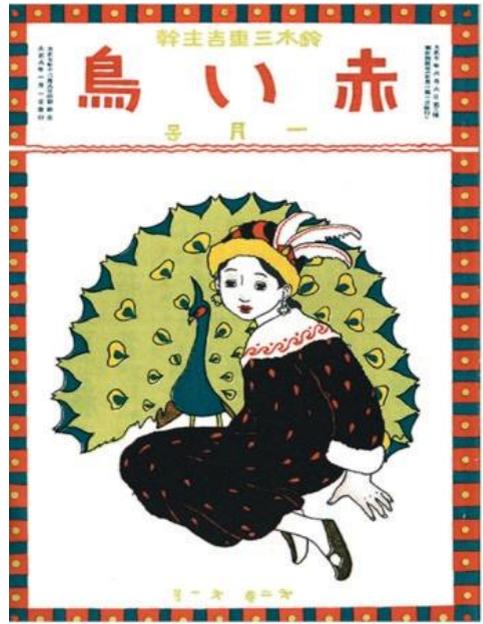
Zheng Zhenduo mentioned the British children's magazine «my magazine» in *Talks on Illustrations*. Later, in the founding declaration of *Children's World*, he listed the foreign literature he referenced, the first of which was «my magazine». «My magazine» predecessor was «Children's Magazine», published by the British large commercial publishing group The Amalgamated Press (AP). The first type of reading material published by its founder was *Comic Cuts*, a picture magazine for adults, so he was familiar with the market benefits of comics. At the same time, this publishing house also had a history of publishing encyclopedias, and later added news, history, geography and other encyclopedic knowledge to «Children's Magazine», and changed its name to «My magazine». The emphasis on image narrative in the content editing of *Children's World* and the broad knowledge perspective reflected in the display of zoology, botany, geography and other natural history content were all influenced by British children's publications in the 20th century.

However, this does not mean that Zheng Zhenduo completely accepted foreign children's books. Zheng Zhenduo's *Children's World* was founded with a distinct children's literature consciousness as its starting point. In addition to the absurd words and nonsense in the content, its target readers were also children in second and third years of primary school and first and second years of high school. *The Youth's Companion – The Companion for all the family* is also one of the references cited by Zheng Zhenduo for founding *Children's World*, but Zheng Zhenduo deliberately erased the subtitle of this magazine. This popular family life book from 1827 to 1927 published advertisements, poems, current affairs satires and other life contents to take care of the reading experience of adult readers. Zheng Zhenduo purposefully selected the children's literature part in the process of reference and filtered out the adult content. For example, in the design of the cover, Zheng Zhenduo did not adopt the method of using historical buildings and celebrity deeds as the cover of *The Youth's Companion – The Companion for all the family*. Instead, he mostly used children as the protagonists of the pictures, and used bright colors to outline the image of modern children with vitality and fashionable clothes. This is consistent with the cover style of the Japanese children's literature magazine *Red Bird* of the same period, both of which placed a relaxed and leisurely Asian child in the dreamy colors of fairy tales (Pic. 8).

In the early period of Chinese children's literature, there were also many references and transformations of foreign images in the specific graphic creation. In the 20th century, a number of action-oriented and continuous comic strips appeared in the West, and their interesting forms were widely learned by the picture stories of Chinese children's literature. For example, the comics in *Ah, My Palette* and *The Favorite Comic* have similar creation techniques, both presenting the same scene in a short number of images, and promoting the development of the plot with destructive pleasure. Both of these graphic narratives set a sun/moon as a spectator above the picture. The round celestial body is similar to a human face after adding expressions. The expressions of curiosity-surprise-laughter imply changes in the reader's storyline, playing a narrative function similar to the «chorus effect» of emotions (Pic. 9 and Pic. 10).

The absorption and reference of foreign graphic narratives made the early graphic narratives of Chinese children's literature present a style that blends Chinese and Western styles. The two pictures at Pic. 11, with very different styles, are both excerpts from Zheng Zhenduo's *Aimei's Flute*. The image content is *Bee Country* and *Hundred Flowers Country* respectively. Each chapter of the text changes the narrative space according to Aimei's travels. Sometimes it is the light and shadow of the beehive in the sketching method, and sometimes it is the lotus flowers and the fairy in the wind in the traditional Chinese mythology. The changes in image style and text style reflect each other. It is a typical work in the founding period of Chinese children's literature graphic narrative that borrowed from Western children's literature and adapted and reorganized it with local culture.

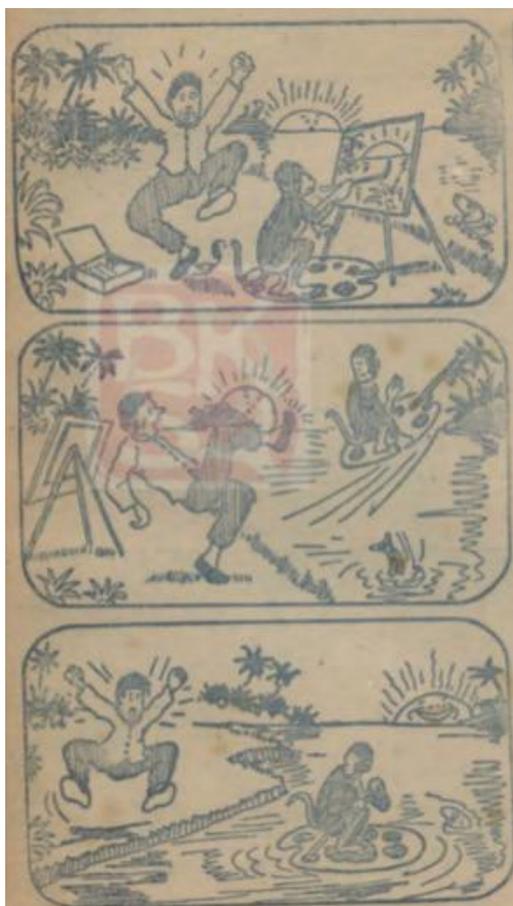
Some researchers have pointed out that the first issue of *Children's Pictorial*, *Insect Carnival*, borrowed its image and story ideas from the Victorian English poem *The Butterfly's Ball*. Comparing these two works, we can see how the early graphic texts of Chinese children's literature were created under the influence of traditional and Western cultural resources. In terms of the main body of the picture, the image in *Insect Carnival* (Pic. 12) and the anthropomorphic animal image in *The Butterfly's Ball* (Pic. 13) are very similar.



Pic. 8. Suzuki Mieyoshi's cover painting of «Red Bird», January 1, 1919



Pic. 9. *The Favorite Comic*, January 20, 1919



Pic. 10. *My Palette*, «Children's World (Shanghai 1922)», vol. 9, 1925, p. 3



Pic. 11. Zheng Zhenduo's, *Flute of Love of Beauty*, «Children's World (Shanghai 1922)», vol. 2, 1923, p. 2



Pic. 12. Jonathan Cott, *Victorian Color Picture Books*, Stonehill Publishing, 1983. p. 178
 Pic. 13. *Insect Carnival*, «Children's Pictorial», vol. 1, 1922, p. 3

The painting method of splicing animal heads onto human bodies in early graphic narratives of Chinese children's literature is also common. In terms of the characters' clothing and activities in the picture, there are various clothing styles such as modified suits, Hanfu, and dresses, as well as various activities such as painting Chinese paintings and writing with fountain pens. The creators replaced the spiritual content of Chinese and Western competitive sports in *The Butterfly's Ball* with poetry, music, dance, and crafts. These cultural phenomena are all microcosms of the social atmosphere in the early Republic of China.

The biggest difference between *Insect Carnival* and *The Butterfly's Ball* is the different composition methods. *Insect Carnival* does not use ordinary single pages of books, but chooses the form of traditional Chinese scrolls, from which we can see the traditional narrative painting techniques of *Night Banquet of Han Xizai*. The whole picture shows four activity groups: craft group, music group, game group, and painting group. Each activity space is separated by a specific form. The row of colorful flags on the far left, the running insects in a row, and the wall of the textile hut divide the whole picture into three parts. The two insects carrying the load outside the textile hut increase the continuity of the space beyond the division. The movement trend of the characters from right to left in the painting is also arranged according to the traditional Chinese reading order. These together form the process and movement of this image in the narrative effect. *The Butterfly's Ball* uses a perspective composition with a concentrated focus, while *Insect Carnival* pays more attention to the integrity of the story picture. In the scattered and multi-center visual structure, it carries a brand-new carnival story about fantasy, sports, and music, which belongs to modern times. Just like Zheng Zhenduo's use of traditional Chinese fine brushwork to connect the images of *Hippo Kindergarten* in the original English magazine, it is the visual pattern of traditional Chinese art that inherits the new world art and passes it on to children, calling on modern emotional power with shared cultural elements. In this process, it is clear that although the form is partially taken from foreign children's literature, China's traditional visual paradigm, Chinese painting pattern, and social reality in the early Republic of China are the main contents of the creative materials of Chinese children's literature.

In addition to the intervention of traditional factors, there are many other ways for Chinese children's literature to recreate foreign graphic content in its early days. There is a fairy tale called *Eyes Opened* in *Little Friend*. From specific text descriptions such as He had already prepared a bamboo basket, covered it with soft grass, and cushioned it with a red blanket, it can be seen that this fairy tale is exactly the same as the image content of *Colorful Western Famous Paintings* in the 4th issue of Volume 9 of «Student». The author put it into the children's literature context of *Little Friend*, attributed the identity of the puppy in the painting to the pet of the children on the cover of the first

and second issues of *Little Friend*, and then *speaks from the picture*, which is a cross-media text translation of Western paintings. The graphic narratives of Chinese children's literature have always been in the flow and intertextuality of the world's visual cultural representation system. In the preface to *My Picture Book Theory*, Japanese picture book theorist Nao Matsui said: «The publication of Chinese children's books reached a fairly high international level in the 1920s, but after the 1930s, it suffered a devastating blow due to our country's war of aggression and its development was hindered»³². Even though it has exogenous characteristics, Chinese children's literature is not just a simple imitation of Western works, but has its own style since its inception, occupying a place in the world's children's literature.

5. *New development trends in graphic narratives in Chinese children's literature*

Since modern times, for the purpose of enlightenment and national salvation, realism began to become the main pursuit of intellectuals at that time. In order to achieve the greatest enlightenment effect for a larger audience, we must first break down the barriers of the elite culture of scholar-bureaucrats and find more real, direct, and unlimited ideas. Loss is a way of reproducing the world to unveil reality, and 'nature' becomes the new aesthetic standard. The art revolution, the vernacular movement, and the new literature revolution are all moving closer to reality. Peng Lijun analyzed in *Hybrid Mirror: Chinese Visual Modernity* that in modern China, the realism style occupies a mainstream position in various visual images. This also affects children's literature. The connection between graphic narratives in children's literature and cognitive methods such as «gezhi» mentioned above is an example.

However, due to the characteristics of children who love fantasy and value subjectivity and sensibility, realism cannot meet all the requirements for the development of Chinese children's literature. The proliferation of mechanical realism dissatisfied the children's readers and advocates of children's literature at that time. According to Shen Qionglou's recollection of primary school education in the early Republic of China, «My mother bought me a new textbook. The first lesson was «A person's hand, foot, knife and ruler» and pictures. Although there are new-style binding textbooks, but they still memorize a paragraph and sing it at the throat». It can be seen that simple image education that depicts reality cannot satisfy children's aesthetic needs. In his evaluation, Zhou Zuoren also mentioned that the realistic works based on adult standards are

³² Nao Matsui, *My Theory of Picture Books*, Hunan, Juvenile and Children's Publishing House, 1997, p. 5.

«unforgettable in terms of craftsmanship, shape and color. There is no spirit of free movement»³³. Liu Haisu, who was working as a picture textbook at the Commercial Press at the same time, observed that «so far, the two hours of picture subjects taught in ordinary middle schools in China every week are nothing more than old manuscripts of flowers, birds, and landscapes, or so-called picture models to teach students Those who copy, or plagiarize some vulgar Western pictures and copy them indirectly for students, are considered to be innovative»³⁴.

Just as the *Twenty-Four Pictures of Filial Piety* aroused the interest of the young Lu Xun, «the picture above says that there are fewer ghosts and more people», what children always yearn for is a mysterious, charming and imaginative space, which is closely related to the uniqueness of children's vision. Compared with adults, children rely more on physical feelings and independent imagination when watching due to imperfect logic. When Xu Yongchang was a child, he went to the theater with his sister. After the play was over, he was walking at night and «suddenly saw a big fireball. It quickly circled in a small circle and disappeared into the waterway. It wasn't until I grew up that I realized that it was the light reflected by the waterway. It can be said that it has been a mystery to me for twenty years, and only now can I find the answer»³⁵. This memory reproduces the subjective side of children's visuality.

The phenomenon that children are prone to visual hallucinations has been mentioned as early as *Lecture Notes on Hypnosis* published in «Mainland». When explaining the causes of children's visual hallucinations such as *Fairy Child* and *Celestial Vision*, the author points out that children's vision is susceptible to deformation due to external factors and their own factors. *Lecture Notes on Monsterology* translated by Cai Yuanpei said: «Although the sensory person is born from the stimulation of the outside world, sometimes he also uses the spiritual thoughts of the inner world as the reason to have visual hallucinations and delusions in the senses»³⁶. Viewing, especially children's viewing, is not an isolated and abstract sensory activity, but carries emotions, beliefs and spirituality.

In 1919, Cai Yuanpei regarded art education as an emotional enlightenment movement that aroused «lively and noble feelings»³⁷ in *Don't Forget Aesthetic Education in the Cultural Movement*. Aesthetic education requires

³³ Zhou Zuoren, *Zhou Zuoren ji xian wen: 1904-1925*, Hainan, International Press and Publication Center, 1995, p. 181.

³⁴ Gao Song, *Ninety-five Years of the Commercial Press*, Beijing, Beijing Commercial Press, 1992, p. 233.

³⁵ Xu Yongchang, *Memoirs of Seeking Jijizai*, TaiWan, Zhonghua Shubu, 2016, p. 7.

³⁶ Inoue Yuande, *General Introduction to the Lecture Notes on Demonology*, Shanghai, Oriental Publishing House 2014 edition, p. 169.

³⁷ Cai Yuanpei, *Don't forget aesthetic education in the cultural movement*, «Morning Post», n. 12, 1919, p. 1.

that the cultivation of children's visuality is not limited to objective observation, but also the emotional and emotional experience brought by pictures. In the 1920s, translation and research on children's studies began in China. «Most children like the color red (warm color)» and «most of them pay attention to the activities and functions of things and people»³⁸. The uniqueness of children's visual experience is also constantly being explored and valued.

These new understandings of children's visuality have affected the budding picture and text narratives of Chinese children's literature. In early visual aspects such as image selection, color lines, and binding design, Chinese children's literature focused on stimulating children's desire to watch. It also began to pay attention to the different interests of boys and girls. For example, the release of special issues such as *Little Brother* and *Little Sister*. Therefore, the graphic narrative of Chinese children's literature is not purely visual-centric, but is based on the context of physical experience such as desire and gender. For example, early children's pictorials attach great importance to fun and the effect of visual imagination. The *Funny Paintings* column of *Children's Educational Paintings* uses the occlusion of things to create visual illusions,³⁹ and the bounty painting activity uses simple irregular shapes to attract children to participate in the visual field. Come to imagination and creative activities.

Children's World pioneered the provision of fantasy graphic narratives for children. The editor-in-chief Zheng Zhenduo borrowed a book by Porter Lander Macclintock from Zhou Zuoren before the launch of the publication. «I wanted to borrow the book *Literature in Primary Schools* because I edited *Children's World* (a kind of children's literature) for reference, please check it out and send it to me when you need it»⁴⁰. In this book, McClintock distinguished the educational functions of different pictures in detail, and discussed the significance of literary picture stories for children's reading: «Those Beautiful, imaginative pictures provide a gateway to an ideal realm, and through the guidance of great and serious artists, children will find that path»⁴¹.

At the same time, Impressionist painting methods were gradually introduced in the 1920s, challenging the clear and calm visual order of the Enlightenment. Impressionist paintings are «simple in shape, flat in color, and when viewed hastily, they are indistinguishable from childish graffiti». The reason is that «the shapes and colors of the objects in the paintings are purely the artist's expression of his emotions towards the objects and his self-esteem. Expression is comfortable and easy to change, and it cannot be said that it is similar to

³⁸ Guan Kuanzhi, *Children's Studies*, Shanghai, The Commercial Press, 1921, p. 23.

³⁹ *Funny Paintings*, «Children's Educational Paintings», n. 42, 1914, p. 12.

⁴⁰ Jia Zhifang, *Chinese Literary History Materials*, Beijing, Intellectual Property Publishing House, 2010, p. 660.

⁴¹ Porter Lander Macclintock. *Literature in the elementary school*, Chicago, The University of Chicago, 1920, p. 12.

the natural appearance»⁴². Children's concept of image creation is closely related to Impressionist painting. In other words, the emotional dynamics and the fragmentation and reorganization of shapes contained in modernist paintings are similar to the world in the eyes of a child. This has been discussed in modern art theories such as *A child of six could do it! cartoons about modern art*. similarity of those. All these enable Chinese children's literature to open up an imaginative space full of possibilities beyond realism. For fantasy graphic narratives, the important thing is not to reproduce reality, but to create a viewing field that suspends rules and reality, accommodates change and reorganization, dissolution and creation, thereby stimulating children's viewing subjectivity and making them Become a literary imagination. In the early 1920s, after reading *Alice's Adventures in Wonderland* translated by Zhao Yuanren, Zhao Jiabi sighed: «It was like following a white rabbit with red eyes and entering another world. He swam through the Pool of Tears and participated in the crazy tea party, listening to the complaints of the mock turtle, I gradually began to daydream, although like Alice's sisters, I also understood that as long as I opened my eyes, everything would become an ordinary world, and those tea bowls. The sound will become the sound of sheep bells, and the queen's sharp throat will become the cry of a shepherd boy»⁴³. From the words of birds and beasts to nonsense, Chinese children's literature has been in the fantasy genre since its inception. In the translation and creation of literary narratives, although realism appears to address reality, it can also obscure reality in the name of truth. Although children's literature uses various fantasy creation methods such as imagination, fiction, and assumptions, it can become a literary expression of the spiritual situation of a generation of realistic children. For the creators of graphic narratives in children's literature during this period, a recognized invisible viewer of children gradually became established. Children's need to seek fresher visual texts outside of traditional schemas is also taken seriously. Everything children see with their eyes continuously creates a desire to watch.

Children's viewing of graphic narratives in children's literature is not only a subjective and imaginative viewing, but more fundamentally, this subjective imagination brings children's viewing back to the realm of the body. This is a continuation of the synesthetic characteristics of traditional Chinese visual culture. It is not intended to establish sensory hegemony over vision, but focuses on opening up the five senses and completing viewing under the control of the heart. There has never been a clear sensory hierarchy in children's education in China. For example, the theory of «aesthetic education replacing religion» pursues pan-sensory acceptance without distinction between the five senses.

⁴² Lü Zheng, *The Passage of the New Painting Movement in the Late Modern West*, «Fine Arts», n. 2, 1921.

⁴³ Zhao Jiabi, *I and Literature*, Beijing, Life Bookstore, 1934, pp. 105-107.

At the same time, feeling and knowledge are a process of integration: «There is no doubt that A child's knowledge is gained from experimental experiences through his sense organs. Through his eyes, he knows the shapes of various things and understands the development process of things. Through his hearing, he can understand other people's emotions. Ideology and the various sounds of nature, through his hands, he understands the properties of various objects, and also learns to deal with things that happen in daily life»⁴⁴. As a literary text, the graphic narrative of Chinese children's literature is intrinsically rational, interpretive and emotional in its acceptance by children. What it emphasizes in children's viewing is not fixed gaze and calm cognition, but an observation method in which the eyes meet the spirit and the subject and object are united. The loosening of restrictions on children's visual power does not point to a pure visual experience, but is combined with other senses or mental activities to advance towards an overall goal.

Conclusion

In traditional societies, children primarily served as the continuers of life, inheritors of culture, and transmitters of history. For modern China, children are not only continuers but also bearers of cultural change. The emphasis of modern Chinese intellectuals on the observation of children is not coincidental but a natural result of historical logic.

Only when children are no longer merely objects of gaze but become subjects of observation can the visible forms of traditional habits and stereotypes be interrupted. The graphic narrative in children's literature provides a literary ground for Chinese children's observation. Its emergence is predicated on viewing children's observation as a subject of literary and aesthetic significance, which has led to the various comic, mysterious, chaotic, fantasy and colorful styles of graphic narratives during this period; it has led to the re-encoding of the world through literature organized by confrontational visual images. This, in turn, becomes a site for the exercise of Chinese children's visual subjectivity, creating for them the power to perceive the world, to look at adults on an equal footing, and to reflect upon themselves. The graphic narrative in Chinese children's literature is a product of memory, change, and history, and it integrates the expectations of origin myths. These complex characteristics ensure that once it emerges, it is no longer a passive object but possesses its own life and desires, generating its own meanings in the gaze and counter-gaze of images.

⁴⁴ Chen Heqin, *A Study of Children's Psychology*, Beijing, Institute of Educational Science, 1983, p. 525.

Biography(s) of a Jewish teacher in Lviv during the period of Galician autonomy (1867-1918)

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ABSTRACT: The article draws on the role of «place» and «time» in biography taken from Yi-Fu Tuan. The subject of interest is Lviv between 1867 and 1918 and its influence on the biographies of Jewish teachers. Lviv was a special city for the Jewish community of Central and Eastern Europe, Jews found in its favorable conditions for the development of social, religious and cultural life. Alongside the traditional stream of religious life, based on centuries-old tradition, worldview currents striving to modernize the life of the old Jews were developing more and more strongly. During the period of Galician autonomy, they enjoyed full public rights, including public education open to them. The consequence of this equality was the appearance of Jewish teachers in public education. The article presents several professional paths that Jewish teachers in Lviv could follow, reflecting their traditional and modern worldview.

EET/TEE KEYWORDS: Lviv; Galicia; Jews; Teacher; Yi-Fu Tuan, XIX-XX Centuries.

In this article, I have chosen to use Yi-Fu Tuan's categories of «place» and «time»¹ as a leitmotiv for biographical research about Jewish teachers in Lviv at the turn of the 20th century. The choice of city and time is not accidental. Lviv – now located in western Ukraine – has for centuries been a place of coexistence of different peoples, cultures and religions², and for this reason its historical heritage is nowadays a subject of discussion and dispute, especially between Poles and Ukrainians. Polish historians write about Lviv as *semper fidelis*, a refuge of Polishness and Catholicism in the eastern borderlands,

¹ Y.-F. Tuan, *Space and Place. The Perspective of Experience*, Minneapolis-London, University of Minnesota Press, 2003, pp. 179-198.

² The complex history of the city is reflected in the title of the Delphine Bechtel article: D. Bechtel, *Lemberg//Lwów/Lvov/Lviv: Identities of a city of Uncertain Boundaries*, «Diogenes», vol. 2, 2005, pp. 73-84.

Ukrainian historians write about «Ukrainian Piedmont», the cradle of modern national consciousness. Lviv is also regarded by Jews as a special place – a family home, a small homeland – because of its centuries-long presence and the richness of its religious, social and cultural life. The well-known Jewish historian Majer Balaban, in his first monograph on the Jews of Lviv, described the city as the «mother of Israel»³. The importance of Lviv in the history of Central European Jewry is demonstrated by the subsequent, now contemporary monographs by Vladimir Melamed and Lukasz Tomasz Sroka⁴. Lviv and Galicia now constitute a mythical space for Jews, Poles and Ukrainians. Yi-Fu Tuan writes, that this concept is ‘an intellectual construct’ differing «from pragmatic and scientifically conceived spaces»⁵. According to him, it is «a response of feeling and imagination to fundamental human needs»⁶.

Given the special significance of this place also in Jewish history, the aim of this article is to analyse the influence of the genius loci of the city on the Poltva River on Jewish teachers. The second half of the nineteenth century and the beginning of the twentieth saw the intensive development of both the city and the exit of the Jewish population from the cultural ghetto. Changes in the social life of Lviv, including the adherents of Judaism, affected the biographies of Jewish teachers. It should be noted that previous biographical studies of Galician teaching have generally not examined Jewish teachers⁷.

In the next subsection, I take a closer look at the demographic, social and cultural conditions of the life of Lviv’s Jews during the period I am interested in, before showing how the wide range of possibilities of social, cultural, religious and national identification influenced the fate of Jewish teachers. I limit my analysis to folk education, sketching several professional paths they may have followed, reflecting the varied worldview attitudes of this minority during the period in question. In the article, I refer to the results of my own research (contained in two monographs and several articles) and empirical material from the Central State Historical Archive of Ukraine in Lviv (sets: 701 Jewish

³ M. Bałaban, *Żydzi lwowscy na przełomie XVI i XVII wieku* [The Jews of Lviv at the turn of the 16th and 17th centuries], Lwów, Fundusz Konkursowy im. H. Wawelberga, 1909, p. 20.

⁴ W. Melamed, *Jewrei wo Lwowie (XIII – pierwsza połowina XX wieku)* [Jew in Lviv (13th – first half of the 20th century)], Lvov, Tekop, 1994; Ł.T. Sroka, *In the Light of Vienna. Jews in Lviv – between Tradition and Modernisation (1867-1914)*, Berlin-New York, Peter Lang, 2018.

⁵ Tuan, *Space*, cit., p. 99.

⁶ *Ibid.*

⁷ See for example articles in: A. Meissner (ed.), *Nauczyciele galicyjscy. Udział polskich nauczycieli w rozwoju teorii pedagogiczne i badań naukowych 1860-1918* [Galician Teachers. The contribution of Polish teachers to the development of pedagogical theory and research 1860-1918], «Galicja i Jej Dziedzictwo» [Galicia and its Heritage], Rzeszów, 1996, Vol. 6; Cz. Majorek, J. Potoczny (edd.), *Biografie pedagogiczne. Szkice do portretu galicyjskiej pedagogii* [Pedagogical Biographies. Sketches to the portrait of Galician pedagogy], «Galicja i Jej Dziedzictwo», vol. 9, 1997.

Religious Community in Lviv, 1785-1939 and 178 National School Council in Lviv, 1867-1921) subordinating them to Yi-Fu Tuan's guiding thought.

1. *Lviv and the Jewish community in the autonomous period*

Lviv was the capital of Galicia, the crown state of the Habsburg monarchy, formed from lands seized from Poland as a result of the First and Third Partitions of this state at the end of the 18th century. At the dawn of autonomy (according to 1869 data), Galicia was home to around 5.5 million people, the most numerous being Poles (2 510 000) and Ruthenians – Ukrainians (2 316 000), with Jews numbering around 575 000⁸. By 1910, the Jewish population had risen to 872,000⁹. Jews were primarily an urban population, and the largest concentration of them was in the Galician capital, Lviv. In 1869, 27,000 Jews lived there, and by the end of the autonomous period 57,000 (1910)¹⁰. They made up less than 30% of the city's population.

During the autonomous period, Jews were no longer a homogeneous community. Until the partition of Poland, they remained a diaspora typical of the Ashkenazi Jews of Central and Eastern Europe, whose rhythm of life was determined by religion and tradition. The socio-religious life of the Orthodox Jews in question was organised by a *kahal*, or Jewish community. It was headed by rabbis. The growing of the younger generation into the tradition of Judaism, preparation for participation in religious ceremonies and the cultivation of customs was ensured by a system of educational influences created by the family, the *heder* and the community as a whole. Traditional Jewish teachers were the *melameds* (Hebrew: teachers). Their social perception was ambivalent – on the one hand, they were valued for introducing the younger generation to the world of Judaism's holy books – Torah and Talmud, but on the other hand, their social status was low. The *melamed* was poorly paid, and the profession was taken up by would-be graduates of *yeshivas*, Talmudic colleges, or people who had failed in other professions. The treatment of teachers in the aforementioned *yeshivas* was different. The *yeshiva* provided an elite education in the Old Jewish community, and the teachers – masters working there – were held in high esteem¹¹.

⁸ A. Polonsky, *Dzieje Żydów w Polsce i Rosji* [History of the Jews in Poland and Russia], Warszawa, PWN, 2014, p. 179.

⁹ F. Friedmann, *Dzieje Żydów w Galicji (1772–1914)* [History of the Jews in Galicia (1772–1914)], in I. Schiper, A. Tartakower, A. Hafftko (edd.), *Żydzi w Polsce Odrodzonej. Działalność społeczna, gospodarcza, oświatowa i kulturalna* [Jews in Restored Poland. Social, economic, educational and cultural activities], Warszawa, 1932, Vol. 1, p. 377.

¹⁰ *Melamed, Jewrei wo Lwowie* [Jew in Lviv], cit., pp. 108, 111.

¹¹ M. Bałaban, *Raport o Żydowskich instytucjach oświatowych i religijnych na terenach*

The world of the Jews of the eastern borderlands of the Polish-Lithuanian Commonwealth, which remained homogeneous until almost the end of the 18th century, changed under the influence of the Hasidic movement. It was started by Israel Ben Eliezer (1700-1760?), who in Podolia called for a religious transformation and a rejection of ossified forms of Judaism. According to him, a follower of Mosaism does not need to follow a complicated system of Talmudic injunctions and prohibitions and the intermediation of a rabbi in his contact with God; he can manifest his faith in an independent conversation with God, praising the Creator in ecstatic dancing, singing and in deeds towards his fellow men. The spiritual leaders of the Hasidim were the *tsadikim*, around whom the co-religionists gathered, wishing to receive God's grace in daily communion with a man sacred to them¹².

Rejecting the authority of the kahal and the rabbi meant deviance for Conservative Judaism, and Hasidism was therefore fought against by the Orthodox. This conflict softened and there was even a reconciliation between Orthodoxy and Hasidism in the face of a new worldview trend that emerged at the end of the 18th century in Germany, namely *haskalah*. Haskalah, or Jewish enlightenment, meant a reform of Judaism aimed at making Jews citizens of the countries of residence. It was initiated by Moses Mendelssohn (1729-1786), a German Jew who translated the Torah into German using the Hebrew font to make it easier for co-religionists to learn German. Haskalah adherents believed that Jews should participate in non-Jewish public life, learn non-Jewish languages, send their children to public schools and provide them with a secular education, and reject traditional dress and customs. However, they did not seek to divest themselves of their Jewish roots; they continued to practise their religion, albeit in a reformed form. For the Orthodox and Hasidic Jews, the followers of the Haskalah were deviants, for they abandoned tradition and sought to assimilate into their Christian surroundings¹³.

To complete the mosaic of attitudes of the Galician Jews of the autonomous period, Zionism and socialism should be mentioned. The origins of the two

Królestwa Polskiego okupowanych przez Austro-Węgry [Report on Jewish Educational and Religious Institutions in the Austro-Hungarian Occupied Territories of the Kingdom of Poland], «Kwartalnik Historii Żydów», n. 1, 2001, p. 46; zob. także: A. Winiarz, *Lubelski ośrodek studiów talmudycznych w XVI wieku* [Lublin Talmudic studies centre in the 16th century], in T. Radzik (ed.), *Żydzi w Lublinie* [Jews in Lublin], Vol. 2. *Materiały do dziejów społeczności Żydowskiej Lublina* [Materials for the history of the Jewish community of Lublin], Lublin, Wydawnictwo Uniwersytetu Marii Curie-Skłodowskiej, 1998.

¹² M. Łopot, *Szkolnictwo Żydowskie we Lwowie (1772-1939)* [Jewish Education in Lviv (1772-1939)], Częstochowa, Wydawnictwo UJD, 2016, pp. 41-42.

¹³ S. Łastik, *Z dziejów oświecenia Żydowskiego. Ludzie i fakty* [From the history of Jewish enlightenment. People and facts], Warszawa, PIW, 1961; J. Holzer, *Enlightenment, Assimilation, and Modern Identity: The Jewish Elite in Galicia*, in I. Bartal, A. Polonsky (edd.), *Focusing on Galicia: Jews, Poles, and Ukrainians 1772-1918*, «Polin. Studies in Polish Jewry», vol. 12, 1999, p. 81.

worldview currents were different – the former developed within the Jewish world, the latter outside it, but with Jewish participation. Zionism was born at the end of the 19th century. The first Zionist congress was held in 1897 in Basel, and one of the first leaders was the Galician Jew Theodor Herzl. Zionism became a political movement, aiming at the creation of a Jewish state and emphasising the national community rather than the religious community of the Jews. Zionists, like Haskalah adherents, supported the development of secular education, but unlike them, they saw general education not as a path to rapprochement with the non-Jewish environment, but as the building of a new Jewish identity. They rejected the stereotype of the peddler Jew, dressed in anachronistic garb and speaking a language that was incomprehensible to those around him, the destitute and resigned to his fate as an «eternal wanderer», replacing it with the ideal of the educated, knowledgeable of the history and language of his own people, a healthy and strong fighter and builder of a reborn Israel. Socialism was attractive to the poor Jewish population because of its preaching of the integration of the lower-class people regardless of their religious or national origin against the exploitation of the possessing classes. In the socialist movement, Jews gained a new identity, were able to discard their old personality, burdened by the baggage of negative experiences related to the prejudices of their Christian surroundings¹⁴.

Turn-of-the-century Lviv – capital of the largest crown state of the Habsburg monarchy, centre of rich social and cultural life, economy, development of education, science and art – was the place where the discussed worldview trends developed. The cultural capital of Lviv's Jewish community influenced the delineation of several paths that Jewish teachers could follow depending on their worldview.

2. Melamed – the biographical path of a traditional Jewish teacher

At the dawn of Galician autonomy, heders were the most widespread educational system among the Jewish population. They primarily provided religious formation for the younger generation of Jews, preparing them for the practice of Judaism. The situation of heder education changed with the introduction of compulsory schooling by the National School Council in Galicia in 1873, which was extended to children and young people between the ages of 6 and 12, regardless of nationality or religion¹⁵. Initially, the Jewish communities expected that the introduction of secular subjects into the heder cur-

¹⁴ Łapot, *Szkolnictwo Żydowskie we Lwowie* [Jewish Education in Lviv], cit., pp. 47-49.

¹⁵ J. Buzek, *Studia z zakresu administracji szkolnictwa publicznego. I. Szkolnictwo ludowe* [Studies in the administration of public education. I. Folk education], Lwów, 1904, p. 44.

riculum would enable the fulfilment of compulsory education, but with the 1873 decree, which recognised that the heder did not ensure the fulfilment of compulsory education¹⁶, there was a gradual regression.

Jewish culture did not develop a uniform model for the training of melameds, and there were no centres for their education or professional development. The most common way to open and run one's own heder was through an assistantship in a heder run by an experienced melamed. The melameds had so-called belfers, assistants, apprenticed to the profession starting at the age of 13-14. Their duties included waking the youngest pupils in their homes, helping them dress and bringing them to the heder. The belfries helped the pupils learn the Hebrew alphabet. An apprenticeship with a melamed usually ended when the belfer started his own family, at which point he opened his own heder using the experience he had gained. However, people engaged in other professions also entered the profession, usually small tradesmen unable to support themselves and their families. Unlike the former belfries, they did not have the relevant experience and generally relied on the knowledge remembered from their own heder education. Also, students of yeshivas, higher Talmudic schools, who either did not graduate from them or did not find employment as a rabbi, became melameds. Of the three categories of people entering the profession distinguished, they had the highest qualifications¹⁷.

During the period of Galician autonomy, heders were subordinated to the administrative authority of the starosts. Attending them did not fulfil the compulsory schooling requirement, so pupils studied in public schools anyway. The educational authorities fought the heders, considering them a source of backwardness and Jewish separatism. The melameds did not enjoy social prestige; a 1907 «School» editorial stated that «the word 'melamed' had become a synonym for infirmity»¹⁸. A caricatured image of a melamed was recorded in his memoirs by the Lviv resident Milo Anstadt:

The teacher was a squat, slow-witted Hasid with a huge belly. He wore drooping trousers with a grey shirt sticking out at the back and a ritual shawl with four tassels called *cicit* imposed over it. In his hand he held a cane with which he would hit students for every mistake they made¹⁹.

According to a census of heders conducted in 1874, there were 71 melameds working in Lviv. Heders were located in synagogues or private flats. As a result of the efforts of the educational authorities to limit the influence of

¹⁶ Łopot, *Szkolnictwo Żydowskie we Lwowie* [Jewish Education in Lviv], cit., p. 123.

¹⁷ *Ibid.*, p. 82.

¹⁸ *Nieco o `chederach` Żydowskich* [A little about Jewish 'heders'], «Szkoła», n. 44, 1907, p. 349.

¹⁹ M. Anstadt, *Dziecko ze Lwowa* [A child from Lviv], Wrocław, Wydawnictwo Dolnośląskie, 2000, p. 10.

traditional religious education on the Jewish community, a census of heders in Lviv in 1913, the last before the First World War, revealed the existence of 30 heders²⁰. It should be added that in addition to the melameds who ran heders, there were also melameds who gave private lessons in the homes of wealthier Jews. No statistics were kept on this group of Jewish teachers, so their numbers cannot be determined²¹.

Nevertheless, during the period of Galician autonomy there was a significant decline in the number of traditional Jewish teachers. This was influenced by the educational policy of the authorities fighting heder education, but also by the progressive secularisation of Lviv's Jews. The decline in interest in religious education was the result of processes taking place within the Jewish community (Haskalah, Zionism, Socialism), as well as the cultural opening that took place in the era of autonomy. One element of this opening was unrestricted access to public school. The combination of these factors meant that the professional path of the traditional Jewish teacher (melamed) was followed by fewer and fewer people.

3. *The biographical path of a Jewish teacher in public education*

The second option, besides the heder, for a member of the Jewish minority in Lviv of the autonomous era for self-fulfilment in the teaching profession was public education. This possibility was opened by obtaining a pedagogical education.

Jews, like representatives of other nationalities, benefited from the system of folk schoolteacher training introduced by the National School Council in Galicia. This was the highest body of the educational authorities, operating from Lviv since 1868, created by the granting of autonomy to Galicia. The pre-autonomous teachers' preparatory schools (there were 11²²) were replaced by state-run three – and then four-year teachers' seminaries. Between 1871 and 1914, there were 18 seminaries throughout Galicia, of which 14 were for men and 4 for women²³. Alongside the state seminaries, private teacher educa-

²⁰ M. Łapot, *Chedery lwowskie w okresie autonomii galicyjskiej (1867-1914)* [Lviv heders in the period of Galician autonomy (1867-1914)], «Kwartalnik Historii Żydów», n. 3, 2014, pp. 500, 511.

²¹ The aforementioned Milo Anstad also benefited from the lessons of a private melamed: Anstadt, *Dziecko ze Lwowa* [A child from Lviv], cit., pp. 8-9.

²² Cz. Majorek, *Galicyjskie szkolnictwo pedagogiczne w latach 1775-1871* [Galician pedagogical education 1775-1871], «Przegląd Historyczno-Oświatowy», n. 3, 1967, p. 385.

²³ A. Meissner, *Spór o duszę polskiego nauczyciela. Społeczeństwo galicyjskie wobec problemów kształcenia nauczycieli* [The dispute over the soul of the Polish teacher. Galician society towards the problems of teacher education], «Galicja i Jej Dziedzictwo», vol. 11, 1999, p. 61.

tion, mainly female, developed²⁴. The change was not only quantitative, but also qualitative – new plans and curricula were introduced in the seminaries of the autonomous era. The education included such subjects as pedagogy and didactics with the history of education, mathematics, natural sciences, physics and the basics of chemistry, geography and history, calligraphy, drawing, singing and gymnastics, as well as elements of handwork (the so-called *ślōjd*). As Andrew Meissner writes, teachers' seminaries in the era of Galician autonomy acted as centres of pedagogical progress, organising libraries, school museums and pedagogical exhibitions²⁵.

There were two state-run teaching seminaries, male and female, and three private ones in Lviv. They formed one of the many paths of professional choice for Jewish youth growing up in Lviv and Galicia during the years of Galician autonomy. It should be noted that the teaching profession was not in high demand among Jewish believers. According to A. Meissner's calculations, among the graduates of Galician pedagogical seminaries, Jews accounted for about 10%²⁶. A similar percentage is shown by an analysis of statistical data from Lviv's folk schools for the school year 1892/1893, when 39 Jewish teachers worked among a total of 410 teachers²⁷. Given that Jews accounted for more than 30% of the city's population at the time, it is fair to say that their representation in the profession in question was low. On the other hand, it corresponded to their numbers in Galician society as a whole.

The decision to study at a teachers' seminary was a professional choice, but also a cultural and identity choice. It signified a declaration to loosen ties with traditional Judaism (if the teacher candidate had previously had strong ties with it) and to undergo processes of acculturation, sometimes assimilation. Lviv of the Autonomous Era offered various possibilities of personal identification to Jewish teachers employed in public education, and the following article will present the variants of Jewish teachers' biographies possible within its framework.

a. *Biographical path of a teacher of a denominational school with the privileges of a public school*

A Jewish graduate of the teachers' seminary could take up a job at the Abraham Kohn male or female schools in Lviv. These were the oldest secular

²⁴ A. Bilewicz, *Prywatne średnie, ogólnokształcące szkolnictwo żeńskie w Galicji w latach 1867-1914* [Private general secondary female education in Galicia 1867-1914], «Acta Universitatis Wratislaviensis n. 1897. Prace Pedagogiczne», vol. CXVI, 1997.

²⁵ Meissner, *Spór o duszę* [The disput over the soul], cit., p. 37.

²⁶ *Ibid.*, p. 186.

²⁷ Łopot, *Szkolnictwo Żydowskie we Lwowie* [Jewish education in Lviv], cit., pp. 64-65.

schools for Jews in the city, run by the Jewish community. They were founded in 1843 by Abraham Kohn, the first progressive rabbi in the Lviv community. In the pre-autonomous era, they were used by children and young people of parents who espoused Haskalah ideas. They taught secular subjects according to the state curriculum, in addition to the Jewish religion and the Hebrew language. These schools observed Jewish festivals and traditions and were staffed exclusively by Jews with the exception of Polish language teachers (which was taught as optional)²⁸.

During the period of autonomy, the status of the Kohn schools and the public perception of the teachers working in them changed dramatically. After the National School Council took over the helm of Galician education and obliged the Jewish population to send their children to public school, the Kohn male and female schools, although denominational, were granted the rights of public schools and were initially the only institutions where children from Orthodox homes could fulfil their compulsory education. However, these schools were not able to accommodate all those obliged to study. For example, in the school year 1870/71, 125 boys entered the first class of the male school and 160 girls in the female school²⁹.

The Kohn schools, which in the pre-autonomous period were regarded as deviant by the dominant conservative circles in Lviv, became in the autonomous period the only acceptable solution for the implementation of compulsory schooling by Orthodoxy and Hasidim. Although secular education was still regarded as *male necessare*, the Kohn schools that implemented it were seen in a more favourable light because of the Jewish composition of the teaching staff, the pupils and the respect for the religion and customs of the followers of Judaism. They were secular schools, so they were a break from the traditional education system based on the heder and yeshiva, but they were run by the Jewish community and the teacher employed there worked among co-religionists – teachers and pupils.

It is interesting to note the changes in the composition of the teaching staff over the autonomous period. The educational reforms of the National School Council marked a turning point in the professional lives of most of the previously employed teachers. It was linked to the introduction of Polish as the language of instruction. All teachers were German-speaking, so the school authorities delayed the implementation of the provisions of the School Act on Polish as the language of instruction until 1887, when the public schools' privileges were not extended. This led to their reorganisation and the recruitment of Polish-speaking teaching staff, prepared to work in the teachers' seminaries established by the National School Council. In the men's school, the following Jewish teachers fulfilling these criteria were employed: Salomon Mandel,

²⁸ *Ibid.*, pp. 91-92.

²⁹ *Ibid.*, p. 112.

Bernard Bachus, Samuel Schlag, Herman Federbusch, Herman Spät, Wilhelm Teitelbaum, and in the women's school: Joanna Planer, Jetti Pultorak, Zofia Blaustein, Antonina Gottlieb, Franciszka Drobner, Anna Margules³⁰. The employment contracts of the older generation of educators, mostly German-speaking, were not renewed: Bernard Sternberg (taught from 1848), Salomon Rosenzweig (from 1849), Jacob Sperling (from 1856), Joseph Ahl (from 1855), Martin Sternal (from 1870) and Rebecca Phillip (from 1855)³¹.

Newly recruited teachers received their education at teachers' seminaries, passed examinations entitling them to work in a folk school and spoke Polish. They were employed as apprentices, temporary teachers and permanent teachers in accordance with the education law³². Let us take a look at the profiles of a few of them.

Herman Spät, born on 24 September 1865, graduated from the departmental school in Gródek Jagiellonski (today Horodok) with an excellent grade, then from the teachers' seminary in Lviv with honours. In accordance with the procedure for the employment of teachers, after graduating from the seminary, he worked as a temporary teacher at a men's school from 1885, preparing for the qualifying examination for a folk school teacher, and after receiving his teaching patent in 1900, he was given a permanent teaching post. He supplemented his qualifications by obtaining a certificate of completion of a drawing course for teachers. He taught Polish, calculus, German, singing, drawing and gymnastics and writing at the Kohn school³³. In the interwar years, as an experienced teacher, he became head of the Kohn school for boys.

Wolf Teitelbaum followed a similar educational path to Spät. He was a graduate of the Polish-language teachers' seminary. He was born in 1863, completed four grades of the real school, after which he continued his education at the teachers' seminary in Ternopil, where he obtained a folk school-teacher's patent. In 1881 he found a job as a teacher in Lviv³⁴.

The pedagogical biography of Samuel Schlag is particularly interesting. He was born in 1859, graduated from the lower secondary real school and the teachers' seminar in Lviv, where he obtained his secondary school certificate in 1879, and a folk teacher's patent in 1884. At the Kohn men's school he taught Polish, calculus, German and writing. A characteristic feature of his personal-

³⁰ State Historical Archive of Ukraine in Lviv [hereafter: SHAUL], set 701, subset 2, sign. 681, k. 36–38.

³¹ SHAUL, set 701, subset 2, sign. 769, p. 39.

³² On the conditions of employment of teachers in a Galician folk school see: E. Juško, *Rada Szkolna Krajowa i jej działalność na rzecz szkoły ludowej w Galicji (1868-1921)* [The National School Board and its activities for the folk school in Galicia (1868-1921)], Lublin-Tarnów, 2013, pp. 69-116.

³³ SHAUL, set 178, subset 2, sign. 4161, p. 30.

³⁴ SHAUL, set 178, subset 2, sign. 5696, p. 90.

ity was that in 1899 he changed his name to Szlagowski³⁵. Some of the Jewish teachers working in the schools in question openly declared their desire to assimilate into Polish culture.

The case of Schlag (Szlagowski) was not an isolated one; Artur Stanisław Załęcki (formerly Abraham Witryol) spelt his name in a similar way. Witryol was already born in the era of Galician autonomy – in 1871, graduated from a teacher's seminary in Ternopil in 1891 and was employed as a teacher at the local J. Perl school from 1891 to 1897. In 1894 he passed the qualifying examination for a teacher of a folk school with honours, and a year later received a faculty school teacher's patent. At the same time, he prepared for the secondary school leaving examination, which he passed at the Ternopil grammar school in 1897. In the same year he took up a teaching post at the Kohn school for boys in Lviv, and continued his education and professional development. While working at the Kohn school, he began his studies at the Lviv University, defending his doctoral thesis on 1 August 1905, entitled *The rule of Frederick II in Polish Prussia (1772-1786)*. Completion of the Faculty of Philosophy enabled Załęcki to obtain a secondary school teacher's licence and move in 1906 from the Kohn folk school to the VII Gymnasium in Lviv³⁶.

Thus, working in a Jewish denominational school meant contact with exclusively Jewish pupils and Jewish teachers. The teachers who undertook it usually presented a worldview similar to that of the assimilationists. Educated in a Polish-language seminary, not infrequently also in a Polish-language folk school, they were fluent in Polish and showed an attachment to Polish culture. The willingness to assimilate is evidenced by examples of adopting Polish versions of Jewish names and surnames. The teaching biography of Artur Załęcki (Abraham Witryol) argues that a Jewish teacher in the era of Galician autonomy was able to pass all levels of professional development, starting with the rights of a folk schoolteacher, through the rights of a departmental school, up to a university diploma and examinations authorising work in secondary education. Unresolved is the question of whether assimilation into Polish culture facilitated Załęcki's professional advancement? It seems that it did not – Załęcki fulfilled the formal conditions that enabled him to work first in a folk school and then in a grammar school. Galician teacher training establishments and commissions awarding folk, departmental and secondary school teacher qualifications did not segregate candidates on the basis of religion.

³⁵ SHAUL, set 701, subset 3, sign. 2670, p. 70.

³⁶ M. Łapot, *Problemy świeckiej szkoły Żydowskiej w Galicji doby autonomicznej w świetle opracowań Artura Załęckiego* [Problems of the Jewish secular school in Galicia in the Autonomous Era in the light of Artur Załęcki's studies], «Prace Naukowe AJD w Częstochowie. Rocznik Polsko-Ukraiński», vol. 17, 2015, pp. 255-266.

b. *The path of a Jewish teacher in a public school*

The second job opportunity for a Jewish graduate of the teachers' seminary was a public school open to all. A unique phenomenon on the educational map of Galicia, possible only in Lviv, where the Jewish population was a numerous and significant element in the cultural mosaic, were the Czacki and Sobieski schools. Although they had the status of public schools and were therefore open to the general population, in practice their pupils were almost exclusively (Christian pupils appeared sporadically) Jewish. This was due to their location in areas inhabited mainly by the Jewish population. The location was not a coincidence, but a deliberate action of the municipal authorities, striving to convince the Orthodox and Hasidic Jews, who still dominated the Jewish population, to attend a public school. The location was only one of the elements intended to encourage Jews to send their children there, in addition to respecting Jewish holidays (days free from classes), teaching the Mosaic religion and making Hebrew language optional. These solutions were intended to convince conservatives that these schools could provide an alternative to heder.

Unlike Kohn's denominational schools, students were not allowed to wear yarmulkes on their heads during lessons, and teachers were not only Jewish. Poles and Ukrainians also taught in them. A Jewish teacher therefore worked with Jewish pupils, but cooperated with Christian teachers.

Nehemiasz Landes (a graduate of the Franz Josef Gymnasium in Lviv) was the first head of the T. Czacki male school; senior teachers: Władysław Kropiński, Izaak Planer, Romuald Starzecki, Stanisław Peszko, Bronisław Chmurowicz, Jan Hanuszewski and Marian Jaworski, while junior teachers were Jan Hlawaty, Jakub Gangel, and apprentices: Chaim Rotter, Natan Szyper, Baruch Tłumak, Hersch Grünes, Marian Taubeles, Wolf Engländer, Izaak Sokaler, Adolf Biegeleisen, Samuel Fränkel³⁷. All of them held a secondary school certificate obtained at a teachers' seminary.

The Jan III Sobieski folk school was opened in the school year 1902/1903. The head of the women's school was Salomea Lévy, besides her, the teaching staff consisted of other Jewish and Polish women: Maria Glecker, Libzie Freudmann, Gitla Kehlman, Sara Perlmutter, Barbara Senyszyn and Józefa Ślęczkowska. The men's institution, on the other hand, was headed by a Pole, Szczęsny Parasiewicz; the teachers were Jews, Poles and Ukrainians: Samuel Fränkel, Chaim Rotter, Michał Siciński, Jakub Gangel, Jan Hanuszewski, Ferdynand Hollitscher, Otto Moskal, Michał Mykietyn, Ludwik Rudnicki, Leon Stachoń, Dawid Berlas, Mojżesz Lamm, Tewel Schreiber, Piotr Walaszek and Józef Witka. After the death of Sz. Parasiewicz, another Pole took over the

³⁷ Łopot, *Szkolnictwo Żydowskie we Lwowie* [Jewish education in Lviv], cit., pp. 294-295.

management of the school – Kornel Jaworski (1866-1910), vice-president of the Pedagogical Society in Galicia³⁸.

It was the parents who decided to send their child to the Czacki or Sobieski schools, and who, unlike the pupils attending the Kohn schools, were loosely attached to religion. In turn, the teachers of these schools were perceived more pejoratively by the conservative Jewish community than the teachers of the previously discussed denominational schools.

c. The path of a teacher of the Mosaic religion

A different variant of the professional biography of a Jewish teacher during the period of Galician autonomy was to work as a teacher of the Mosaic religion. Due to the specificity of the subject content, located in the area of traditional religious education, implemented in the heder, and the requirements of educational law for a public school teacher, which came down to the acquisition of pedagogical qualifications and competences, the teacher of Mosaic religion combined the two characterised paths of professional development of Jewish teachers. For, on the one hand, his substantive preparation encompassed the knowledge available to the melameds, while on the other hand, his pedagogical preparation was to correspond to the level of other teachers employed in public education. The teacher of the Mosaic religion was responsible for the religious formation of adherents of Judaism in a public school setting.

The introduction of the Jewish religion as a subject to be taught in public school (under the name 'Mosaic religion') was a consequence of Jews being subjected to compulsory schooling in the era of Galician autonomy. Religion was a compulsory subject in a public school and was to be taught in a given establishment if at least 20 pupils of a given religion attended. Alongside Roman Catholic classes, according to the national composition of the country, Greek Catholic, Evangelical and Jewish religions were therefore taught. The appearance of this subject in the curricula of folk schools and secondary schools caused many problems for the Jewish community, as well as for the school authorities. These stemmed from the lack of textbooks, problems with defining the language of instruction (initially it was German, because the students did not understand Polish, linguistic problems also concerned the place of Hebrew in the teaching of the subject, it was another foreign language, but at the same time the language of Jewish liturgy and prayers), the lack of teachers with the appropriate qualifications (knowledge of the Polish language, pedagogical and Judaic preparation) and the institution that trained them³⁹.

³⁸ *Ibid.*, p. 138.

³⁹ His issue is discussed extensively in: M. Łapot, *Religia mojżeszowa w szkolnictwie pub-*

Initially, the teachers of the Mosaic religion were rabbis and teachers of this subject from the Kohn schools. However, they were German-speaking, which was in conflict with the educational law in force. In addition, there were only a few of them, so they could not teach all the classes in all the schools in the city with at least 20 Jewish pupils. In order to fill the vacant posts of Jewish religion teachers, the school heads, with the permission of the Jewish Religious Community in Lviv and the National School Board, entrusted religion lessons to secular subject teachers. It was sufficient that such a teacher had passed an examination before a special commission in the Jewish community or in a male teachers' seminary. The level of requirements was very low. Moreover, it happened that teachers were entrusted with the implementation of lessons in this subject without their knowledge. For example, Isaac Isidor Planer, working at the Czacki School, found out after the summer break that he had been nominated for a position as a religion teacher and had obtained, without any examination or even the intention to apply, a certificate, the so-called aptitude, entitling him to teach the subject in a public school. He described the situation as follows:

[...] I have not possessed and do not possess any aptitude for teaching these subjects, I have not deserved to be granted perfect aptitude with anything – for, as everyone probably knows, in the field of literature and the study of religion and the Hebrew language I have done nothing, I have not published any religious or Hebrew works or pamphlets, I have not translated any works of similar content, I have not written any dissertations, I have never had any lectures in these subjects, I have not taken any examination in these scientific subjects [...]⁴⁰.

The professional and social status of the teacher of the Mosaic religion was complex, and this was probably the reason for the weak interest among Jews in this career path. Such a teacher – from the point of view of the conservative community – was generally viewed less favourably than a Jewish secular teacher, since he pretended to replace the traditional teacher of the Jewish religion, the melamed. He was associated with the public school, which was supposed to change the identity of young Jews and the centuries-old time-honoured way of life and thinking of the members of this community. The supporters of Zionism treated the teachers of the Jewish religion in the public

liczne w Lwowie w okresie autonomii galicyjskiej (1867-1918) [Mosaic Religion in Public Education in Lviv during the Galician Autonomy (1867-1918)], 2. ed., Częstochowa, Wydawnictwo UJD, 2024; I have included the main theses of the monograph in the article: M. Łopot, *How to Teach Mosaic Religion? The Dilemmas Facing Galician Jews in the Period of Autonomy (1867-1918)*, «Journal of Jewish Education», n. 4, 2020, pp. 375-399.

⁴⁰ M. Łopot, *O nauczaniu religii mojżeszowej w szkołach publicznych we Lwowie w okresie autonomii galicyjskiej – casus Izaaka Izydora Planera (1854-1925)* [On the teaching of Mosaic religion in public schools in Lviv during the period of Galician autonomy – the case of Isaac Izidor Planer (1854-1925)], «Prace Naukowe Gliwickiej Wyższej Szkoły Przedsiębiorczości. Pedagogika», n. 3, 2011, p. 257.

school unwillingly, these teachers were for them Polonised Jews, traitors to the Jewish national cause. They also did not find recognition among teachers of secular subjects. One sign of their disregard was the fact that they did not participate in the meetings of the pedagogical council at schools, since many of them had no pedagogical training or did not know the language of instruction, Polish. In addition, due to the difficulty of bringing together pupils attending different classes every day, lessons in the subject were often organised in the afternoons, alongside music or handwork, giving the impression that the subject was less important. As a result, in the pages of the press organ of the teachers of the subject in Galicia, the magazine «Wychowanie i Oświata», one teacher wrote as follows: «[...] many of us have experienced that the teacher of religion is often regarded merely as an auxiliary force and not as a teacher in his own right for his subject. [...] the pupils do not pay any attention to religious instruction and do not learn. And when a religion teacher dares to give a correction in his subject, he draws the displeasure and even the hatred of the class teacher, the school head and the parents»⁴¹. He further summarised: «the seriousness of the position of the religion teacher is not special or enviable»⁴².

The low prestige of teachers of the Mosaic religion was due to the lack of an appropriate centre to prepare them for the profession, combining substantive (Judaic) and pedagogical knowledge. It was not until 1902 that the Institute for the Training of Teachers of Mosaic Studies in Lviv was established, its problem being the poor interest of potential candidates. Public education struggled with a chronic shortage of teachers in this subject. It was solved on an ad hoc basis by employing teachers of other subjects in this capacity (the case of I.I. Planer), including women⁴³.

It is worth noting that at the beginning of the Twentieth century, the community of Jewish teachers in public education in Galicia gained a distinct professional consciousness, which was reflected in the establishment of teachers' societies (in Stanisławów and Lviv). These associations also published pedagogical magazines – «Wychowanie i Oświata» and «Haor-Światło» – entirely devoted to the subject and teachers' issues⁴⁴.

⁴¹ I. Hoffman, *Głos z kraju* [A voice from the country], «Wychowanie i Oświata», 1912, no. 67-68, p. 247.

⁴² *Ibid.*

⁴³ M. Łapot, *Nauczycielki religii mojżeszowej w szkołach publicznych w Galicji w latach 1867–1939* [Female teachers of Mosaic religion in public schools in Galicia, 1867-1939], «Prace Naukowe AJD w Częstochowie. Pedagogika», vol. 20, 2011, pp. 407-418.

⁴⁴ Łapot, *Religia mojżeszowa* [Mosaic religion], cit., pp. 158-162; M. Łapot, *Czasopismo 'Wychowanie i Oświata' (1905-1926) – dokument początków ruchu zawodowego nauczycieli religii mojżeszowej w Galicji* [The journal «Wychowanie i Oświata» (1905-1926) – a document of the beginnings of the professional movement of teachers of Mosaic religion in Galicia], in Z. Trębacz (ed.), *Związani Historią. Stosunki Polsko-Żydowskie. Kultura, literatura, sztuka i nauka w XX wieku* [Bound by History. Polish-Jewish Relations. Culture, literature, art and science in the 20th century], Warszawa, ŻIH, 2020, Vol. 2, pp. 303-319.

Conclusion

The development of public education during the period of Galician autonomy, the opening up of the teacher training system to candidates of different confessions and the inclusion of the Jewish population in compulsory education led to the emergence of a second pattern – alongside the traditional type of Jewish teacher (melamed) – of the secular (public) teacher. Within the second pattern, we can speak of two variants – the denominational schoolteacher and the public school teacher. Alongside these, there was also the professional path of the Jewish public-school teacher, combining features of the two earlier patterns. The different professional paths of Jewish teachers reflected the worldview divisions of Lviv, and Galician Jews more broadly. The melamed remained an attractive proposition for the orthodox Jew, the public-school teacher for the proponent of modernisation, while modernisation could take different forms and intensities. Among public teachers, teachers of the Mosaic religion showed the greatest attachment to tradition, while public school teachers were supporters of the Haskalah. An expression of the aspirations of Polonisation were the name changes.

It should be mentioned that Jewish teachers employed in public schools belonged to the Pedagogical Society of Lviv. Membership in the society, founded in 1868, became a common element in the biographies of Herman Federbusch, Leon Eichel, Ewa Taubes, Herman Spät, Wilhelm Teitelbaum, Sigmund Taubes, Karolina Oberhard, Alexander Oberhard, Wanda Rittermann, Salomea Perlmutter, Anna Perlmutter, Julia Unterricht and Eugenia Kummer⁴⁵.

Referring to Yi-Fu Tuan's reflections, it is worth noting that the author considers the category of place together with the notion of 'space', treating it as a binary term that allows the category of place to be circumscribed. He writes that

'space' is more abstract than 'place'. What begins as undifferentiated space becomes place as we get to know it better and endow it with value [...]. The ideas 'space and place' require each other for definition. From the security and stability of place we are aware of the openness, freedom and threat of space and vice versa⁴⁶.

The distinction between «space» and «place» seems to be an inspiring thought with regard to Jewish teachers, but also Jewish students in Lviv of the autonomous period. The Jewish community until the autonomous period largely remained in a «tame» space, created by such «places» as the synagogue, the kahal, the heder, the house, the street, the Jewish quarter. These provided the sense, mentioned by Yi-Fu Tuan, of stability and security, while

⁴⁵ Łopot, *Szkolnictwo Żydowskie we Lwowie* [Jewish education in Lviv], cit., p. 296.

⁴⁶ Tuan, *Space*, cit., p. 6.

the non-Jewish world around them was a «space», an alien terrain. With the inclusion of Jewish children and young people in compulsory schooling and the provision of public education to the Jewish minority in the age of autonomy, the Jewish world, previously confined to the previously mentioned places, expanded.

Public schools became new «places», progressively integrated into the topography of tame places, and enabled the exploration of «space» outside the Jewish *habitus*. Public schooling offered Jews the opportunity to leave the cultural ghetto, to acculturate or assimilate. The Kohn, Czacki and Sobieski folk schools, as well as other schools open to all students without distinction of nationality or religion, became «places» that influenced the biographies of the students who attended and the teachers who worked there.

«Infermiere dell'anima». Madrine del soldato o di guerra e altre forme di *maternage* nel I e nel II conflitto mondiale

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«Nurses of the Soul» Soldier's mothers, war godmothers and other forms of maternage in World War I and II

ABSTRACT: The paper deals with the figure of the soldier's godmother, better known as the war godmother, and it considers how she appears in Italy. The history of the war godmother is analysed within the broader, general framework of the moral and material contribution played by women during XX century conflicts from World War I. This paper aims also at unlocking a new historical-educative researching topic.

EET/TEE KEYWORDS: First World War; Second World War; Soldier's godmother; Correspondence; Emancipation press; «La donna»; XX Century.

Note introduttive

Non è stato scritto granché sulle «madrine del soldato», più note come «madrine di guerra», tuttavia quel poco che c'è consente di farsi un'idea di quando sono comparse in Italia e della funzione svolta. In molte pubblicazioni, uscite in occasione del centenario della Prima guerra mondiale, sono spesso menzionate, ma il più delle volte in modo generico e ripetitivo, cosicché persistono molte zone d'ombra. Sembra tuttavia si possa ritenere che non poche signorine o signore dell'epoca, di regola di buon lignaggio o comunque di estrazione alto-media borghese, abbiano tenuto una corrispondenza più o meno stabile con chi era al fronte, al fine di sostenerne con le lettere e i pacchi-dono, il morale, spesso senza conoscersi mai, altre volte restando amici e altre ancora convolando persino a nozze. Tale corrispondenza sarebbe intercorsa dapprima con giovani ufficiali o sotto-ufficiali, celibi e non fidanzati, e poi, in forma diversa, anche con soldati semplici.

C'è un punto su cui si riscontra sostanziale concordanza ed è che tale figura, chiaro simbolo del perenne materno ascritto e svolto, più o meno diligentemente dalle donne, sia nata in Francia durante il primo conflitto mondiale. Per i più, l'iniziativa sarebbe partita da alcuni ufficiali, che, constatato lo sconforto dei militari che in trincea non ricevevano lettere, avrebbero sollecitato, attraverso i comandi, signorine e signore francesi a stabilire una corrispondenza con chi era al fronte, al fine di far sentire la premurosa vicinanza della gente. Stando invece ad un informato articolo, apparso nel giugno 1916 sulla rivista «la donna» – supplemento quindicinale femminile de «La Stampa» di Torino e de «La Tribuna» di Roma, che riprenderemo più avanti – la nascita sarebbe andata diversamente. Secondo l'autrice, Jeannette (pseudonimo di Felicita Rey Ragazzoni), la figura delle *Marraines des poilus* – questo il nome originario – sarebbe stata «ideata dal *Journal* fin dall'inizio della guerra», e avrebbe avuto «subito larghe adesioni in tutta la Francia [...] appoggiata da molti altri giornali e riviste»¹.

C'è da credere che proprio questa sia l'origine, perché Jeannette aveva stretti rapporti con gli ambienti francesi, essendo il marito, Ernesto Ragazzoni, corrispondente dalla Francia del quotidiano torinese, come si precisa più dettagliatamente in nota². A prescindere da tali discordanze, comunque non so-

¹ Jeannette, *La Madrina del soldato*, «La Donna», n. 275, giugno 1916. Così scriveva Jeannette: «Il geniale scrittore e fine psicologo, il Dr. Dasny, osservava con ragione che la donna di Francia non organizzò solo opere di carità, d'assistenza, di soccorso, ma fece assai più 'Elle a créé un immense jaillissement de Foi et de Force', e fin dai primi giorni fece scorrere verso i combattenti le onde misteriose e rinfrescanti di quella pura sorgente. Essi erano partiti pieni d'entusiasmo e di risolutezza, ma la donna, giorno per giorno, aggiunse alle loro forze la sua forza di fede e di speranza. [...] Gli parla, lo incoraggia, l'assiste, lo anima col suo soffio, mentr'egli offre alla Patria la sua vita. È questo un compito nuovo che ella seppe crearsi, per rendere meno dura ai combattenti la brutale vita del campo. In tutti i tempi la donna fu una consolatrice e un soave pensiero per gli uomini d'armi, [...] Non bisogna credere che ogni soldato abbia una sorella, una madre, una moglie, una fidanzata che gli scriva. [...] Vi sono poi gli orfani, i figli di nessuno, i dimenticati, che sentono al campo, sai più che altrove, il loro isolamento. E non bisogna scordare quelli cui non mancano le buone lettere famigliari, ma che hanno bisogno, bisogno assoluto di un po' di novità e di poesia, della parola elevata di una donna colta e gentile, magari ignota, che porti una gioia luminosa, una delicata ebbrezza nella sua vita di trincea».

² Felicita Rey in Ragazzoni ebbe un ruolo importante nella citata rivista ed anche nel sostegno al madrinato. Era figlia di un colonnello dei bersaglieri ed aveva sposato nel 1899 Ernesto Ragazzoni, un giovane tanto versatile quanto inquieto, a sua volta figlio di un ufficiale dell'esercito e proprietario terriero. Ragazzoni aveva fatto studi tecnico-commerciali, ma amava la letteratura e lo scrivere, cosicché, pur lavorando dapprima in banca e poi nelle ferrovie, aveva preso a collaborare con diversi periodici fra cui «La Stampa» di Torino, guadagnando credibilità nel settore giornalistico, tant'è che divenne, se pur per poco tempo, direttore della «Gazzetta di Novara», da cui venne presto estromesso, per le sue simpatie anarchoidi e i duri attacchi contro la «buona società» novarese. Dopo questo episodio, riprese la collaborazione con «La Stampa», in qualità di corrispondente estero, dapprima da Parigi, poi da Londra e ancora da Parigi dal 1912 al 1918. Riteniamo che queste informazioni siano utili per meglio inquadrare il contributo giornalistico della moglie, sotto lo pseudonimo di Jeannette, nella redazione de «la donna», ed anche per meglio comprendere la familiarità che ella aveva con la Francia, a partire dal suo stesso

stanziali, sembra essere assodato che la figura della madrina sia appunto di origine francese e che prese a diffondersi velocemente anche oltr'alpe: in Italia comparve nel corso del 1916, quindi all'incirca un anno dopo la solenne proclamazione di guerra del 24 maggio 1915, perché quel tipo di corrispondenza strideva con gli inveterati e prevalenti modelli del rapporto uomo-donna operanti nel nostro paese.

1. *Non fu una guerra-lampo*

La durata della I guerra mondiale, altrimenti definita da noi come quarta guerra di indipendenza, perché con essa si sarebbe dovuto compiere il disegno unitario – risultato che avremmo potuto invero conseguire con la semplice neutralità, senza tanti morti, feriti e altrettanti dolori e sacrifici – fu da molti e soprattutto dall'alta dirigenza militare, del tutto sottovalutata. La convinzione prevalente era che potesse risolversi in una sorta di operazione lampo, ma, come altre volte, non andò così. Essa si trascinò infatti per ben tre anni e mezzo, fino al 1918 e si concluse con la nota pace di Versailles, da cui l'Italia uscì insoddisfatta ed anche maltrattata. Una guerra che, oltre al morale, logorò le nostre finanze e aprì una fase di conflitti sociali nel Paese, conclusasi con la marcia su Roma, il 28 ottobre 1922, e l'instaurarsi di lì a poco della dittatura fascista.

Contrariamente alla vulgata corrente che, in virtù della comparazione del primo con il secondo conflitto mondiale, ha per molto tempo descritto il primo come una guerra combattuta al fronte, con scarse privazioni e disagi per la popolazione civile, non va dimenticato che se ai comuni cittadini fu di regola risparmiato di avere il nemico sotto casa, come accadde invece fra il '40 e il '45, non per questo la gente comune fu al riparo dalle nefaste conseguenze che accompagnano sempre i conflitti

Quando si pensa alla guerra, nell'immaginario collettivo prende di solito forma l'idea che la dura, brutale esperienza abbia interessato gli uomini, perché direttamente impegnati al fronte. Ma così è stato, per quel che ci riguarda, nelle guerre risorgimentali, guerre circoscritte e coinvolgenti di regola poche centinaia di migliaia di soldati al comando di ufficiali o sottoufficiali appartenenti alle ristrette élite intellettuali aristocratico-borghesi che ne dividevano gli obiettivi. Più o meno recenti e meglio documentate analisi hanno al contrario delineato ben altri scenari, non solo in relazione alla Seconda guerra mondiale, in cui è facile intuire il coinvolgimento dell'intero Paese, avendo

il fronte attraversato l'Italia dal Sud al Nord, ma anche in riferimento alla prima, alla cosiddetta «Grande Guerra», nota comunemente come «guerra di trincea».

Da tali pubblicazioni emergono infatti scenari, che, al contrario, evidenziano una ben più cruda realtà, la quale mette altresì in risalto l'apporto espresso anche dall'«altra metà del cielo», ovvero dalla componente femminile, sia in aree limitrofe ai teatri bellici sia nell'intero Paese, in sostituzione della forza-lavoro maschile, manuale e non. Come ha scritto Matteo Ermacora: «Lo 'sconvolgimento' dei ruoli familiari determinato dai richiami alle armi portò alla ribalta il lavoro delle maestranze femminili e minorili in tutti i principali settori produttivi»³. In breve, particolarmente negli ultimi decenni sono venuti a dissolversi molti degli stereotipi che si erano trascinati nel tempo, *in primis* sui libri di testo, oltre che in molta letteratura più o meno scientifica, che la definiva una guerra di logoramento combattuta nelle trincee, al confine⁴. Certo c'era una netta differenza fra le zone di combattimento e il resto del Paese, ma l'atmosfera bellica incombeva un po' ovunque.

Infatti, al di là delle trincee, la vita non si svolse affatto su per giù con lo stesso tran-tran di prima, e non solo per il tormento che genitori, mogli e fidanzate provavano per la sorte dei loro cari lontani. Ad essere profondamente modificata fu, dal Nord al Sud del Paese, la vita quotidiana di tutta la popolazione, dato che svariati milioni furono gli uomini – giovani, meno giovani ed anche anziani – spediti al fronte o nei cosiddetti 'cantieri di guerra' prossimi al fronte, per la preparazione del contesto circostante. Di rimando, il cosiddetto 'angelo del focolare' dovette rimboccarsi le maniche più di prima nelle campagne, ma adesso anche nelle città, onde evitare la paralisi dei servizi e il tracollo dell'economia del Paese. Non a caso è stato scritto che il cosiddetto «fronte interno fu [...], per certi aspetti, fronte femminile»⁵.

L'anzidetta grande guerra, a dispetto della sua altisonante definizione che in virtù di quell'aggettivo ha suscitato un automatico sentimento reverenziale, non ha affatto risparmiato la gente comune. Gianni Oliva, introducendo un libro immeritabilmente poco noto, *Donne nella Prima Guerra Mondiale*, ha scritto: «il 1915-18 è stata un'esperienza collettiva» e come tale non ristretta solo a chi combatteva. Ed egli motiva, con numeri alla mano, il suo ragionamento:

Con oltre 5 milioni di mobilitati, non c'è famiglia, dalla Valle d'Aosta alla Sicilia, che non abbia al fronte un padre, un figlio, un marito, un fratello, un parente, un vicino di casa: i cittadini rimasti a casa vogliono sapere dove si combatte, per che cosa, i nomi dei coman-

³ M. Ermacora, *Cantieri di guerra. Il lavoro dei civili nelle retrovie del fronte italiano (1915-1918)*, Bologna, il Mulino, 2005, p. 114.

⁴ Fra i molti volumi, si ricorda in particolare: A. Gibelli, *La grande guerra degli italiani 1915-1918*, Milano, RCS Media Group S.p.A, 2014 (1° ed. 1998).

⁵ *Ibid.*, p. 175.

danti e dei reparti, l'esito delle battaglie. È la nascita dell'opinione pubblica, il momento in cui i grandi fatti nazionali non sono più patrimonio di pochi, ma diventano patrimonio condiviso da tutti, maschi e femmine, ricchi e indigenti, intellettuali e contadini⁶.

Il primo conflitto mondiale ha segnato una netta linea di demarcazione fra il prima e il dopo, perché è stato un evento di enormi proporzioni, definito, ancora con più forza da Antonio Gibelli «la prima, grande esperienza collettiva degli italiani»⁷. Mai si era infatti verificato in Italia un simile coinvolgimento mentale e morale della popolazione intera, un così generale risveglio delle coscienze, un cambiamento tanto inedito da investire e in certo senso travolgere persino l'universo femminile. Le donne, giovani ed anche meno giovani, dalle seconde o terze file in cui erano state relegate non di rado loro malgrado, all'ombra prima di un padre o di un fratello maggiore e poi di un marito che decidevano al posto loro o nei migliori dei casi ne avallavano con la loro potestà le scelte, furono sollecitate a farsi avanti sul proscenio della vita.

E lì rimasero per tutta la durata del conflitto, manifestando, in tante, un solido spirito patriottico, che accese nelle più emancipate la speranza che tutto quel sacrificio valesse la conquista di una diversa visibilità politica e sociale. Alla fine del conflitto esse furono costrette invece a far «ritorno a casa», a rientrare cioè con poche eccezioni nei ranghi, non senza una buona dose di sollievo ma anche di delusione. A deluderle e anche a disilluderle fu, fra le altre cose, la legge che attribuiva l'ambito diritto di voto amministrativo e politico alle donne che, pur approvata a larga maggioranza alla Camera, si incagliò per il successivo scioglimento del Parlamento, restando in sospenso fino, com'è noto, al secondo dopoguerra. Concluse invece positivamente l'iter parlamentare, e non fu una conquista da poco, se pur meno incisiva politicamente, un'altra attesa legge, intitolata *Norme circa la capacità giuridica della donna*, detta anche legge Sacchi, che abolì l'istituto dell'autorizzazione maritale⁸. Era un traguardo conquistato a caro prezzo, non certo una concessione.

2. Le emancipazioniste si dividono

Va ricordato che già nel corso del periodo giolittiano, nell'ambito delle associazioni emancipazioniste femminili, si era affievolito lo spirito pacifista ottocentesco che le aveva caratterizzate, intravedendo nella guerra un possibile viatico per una affermazione socio-politica delle donne, come ricostruisce Tiziana Pironi nel suo bel volume *Femminismo ed educazione in età giolittiana. Conflitti e sfide della modernità*⁹. Questo cambio di prospettiva nel rapporto

⁶ G. Oliva, *Prefazione*, in B. Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, Torino, Susalibri, 2015, p. 3.

⁷ Gibelli, *La grande guerra degli italiani 1915-1918*, cit., p. 7.

⁸ Si tratta della legge del 17 luglio 1919, n. 1176. Cfr.: L. Gazzetta, *Un secolo fa l'abolizione della autorizzazione maritale*, in <<https://ilbolive.unipd.it/it/news/secolo-fa-labolizione-dellautorizzazione-maritale>> (ultimo accesso: 18.08.2024). Per la questione si veda anche: A. Buttafuoco, *Cronache femminili. Temi e momenti della stampa emancipazionista in Italia dall'Unità al fascismo*, Arezzo, Dipartimento di storico-sociali e filosofici dell'Università degli Studi di Siena, 1988, pp. 253-254; Gibelli, *La grande guerra degli italiani 1915-1918*, cit., p. 212.

⁹ T. Pironi, *Femminismo ed educazione in età giolittiana. Conflitti e sfide della modernità*, Pisa, ETS, 2010, pp. 155 ss.

pace-guerra aveva generato una profonda crisi all'interno degli ambienti del femminismo emancipazionista, crisi che deflagrò in occasione dello scoppio della guerra mondiale. Ovviamente, la maggioranza delle donne italiane era del tutto estranea a tali aspettative e a tali frizioni, e non solo subì la scelta interventista, ma fu costretta, se pur con riluttanza, a lasciare i muri domestici per la sopravvivenza propria, dei figli o degli anziani genitori.

Pur nel loro complesso contrariate, esse si fecero avanti con decisione e presero via via ad avere un ruolo sempre più attivo e determinante nel mondo del lavoro, non disdegnando di impegnarsi ancor più di prima nelle campagne per la coltivazione dei campi, l'allevamento del bestiame, la produzione casearia e alimentare; di inserirsi a vario titolo nei servizi: negli ospedali, nelle poste, in ferrovia o nella rete tramviaria e persino nella protezione civile, come vigile del fuoco; di entrare come operaie nelle fabbriche, comprese quelle dette «della morte», in cui si producevano materiali indispensabili al fronte: spolette, cartucce, proiettili, bombe a mano, etc., dando prova di determinazione, coraggio ed anche di sorprendente forza d'animo e resistenza fisica¹⁰. Per inciso non va dimenticato che, percentualmente, erano pagate molto meno degli uomini ma un po' più dei ragazzi, anch'essi ampiamente mobilitati¹¹.

Accanto a tali compiti, esse ne svolsero altri ancora, assai più faticosi e rischiosi, meno conosciuti, a ridosso delle trincee, della linea del fronte. Al riguardo Bruna Bertolo, nel suo già citato volume, ha scritto:

Si è sempre parlato poco del massiccio reclutamento di donne e adolescenti per lavori di vario genere lungo la linea del fronte. In attesa e previsione della guerra, ci fu un'enorme mobilitazione di lavoratori civili con il compito di apprestare le opere logistiche necessarie al fronte: strade, ponti, linee difensive, baraccamenti, magazzini. Un immenso cantiere di guerra che, per numero di addetti e impostazione strategica, costituì uno dei settori più importanti dell'economia di guerra¹².

A lavorare in quell'«immenso cantiere» arrivarono, insieme a molte giovani donne, di solito friulane, anche tanti ragazzini e ragazzine fra gli 11 e i 13 anni – figli, figlie o nipoti – per spostare calcinacci, rimuovere neve e ghiaccio dalle strade, impegnarsi in lavori di manutenzione dei sentieri rupestri, ripidi e scomodi, nel trasporto di scorte, merci, materiali di varia natura verso il fronte ad alta quota.

Ermacora ha descritto con efficacia in molte pagine delle sue documentate

¹⁰ P. Barbèra, *Le donne e la guerra*, Firenze, Tip. Barbèra, 1916; Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...* cit., pp. 54-57.

¹¹ Ermacora, *Cantieri di guerra. Il lavoro dei civili nelle retrovie del fronte italiano (1915-1918)*, cit., pp. 114-130; M. Dallonda Casadei, *La donna nelle due guerre mondiali. Una storia nascosta*, Cesena, Società Editrice «Il Ponte Vecchio», 2016, p. 24.

¹² Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 58.

ricerche sulla Grande Guerra il contributo offerto dalle donne nei lavori sopra descritti. In seguito, collaborarono anche alla costruzione delle teleferiche, ovvero nei lavori di ancoraggio dei tiranti e delle funi per il trasporto del materiale bellico ad alta quota. Si quantificano in ben ottomila le donne e le ragazze impegnate, nel corso del 1917, nell'allestimento di questi teatri bellici, numero che pare raggiungesse le venti-mila unità dopo Caporetto, ovvero negli ultimi mesi di quell'anno infausto¹³.

Se tutti questi lavori, cui abbiamo accennato, implicavano una non comune fatica fisica, certamente il più gravoso e pericoloso fu «quello delle portatrici, di viveri e munizioni, là dove neanche i muli riuscivano ad arrivare»¹⁴. Era una mansione ingrata perché implicava non solo una fatica sovrumana, ma un evidente rischio di morte addentrandosi nelle aree del fronte¹⁵. Tuttavia, non si tirarono indietro, lassù avevano un fratello, un marito, un conoscente oppure nessuno, ma lo fecero egualmente. «Andiamo, che altrimenti lassù muoiono di fame»: questo, si è scritto essere il loro adagio, e non indietreggiarono neppure davanti a morti o a feriti, che talvolta trasportarono a valle.

Le portatrici non furono comunque le sole a rischiare la vita. Molte delle operaie nelle fabbriche di guerra, dove si maneggiavano armi e polvere da sparo – nel 1916 si afferma fossero già 90.000 – o si ferirono gravemente o si ammalarono e poi morirono, non solo ma soprattutto a causa di quella sottile polvere che maneggiavano con disinvoltura e che respiravano senza la benché minima protezione¹⁶.

Ma il contributo femminile in tempo di guerra non si esaurisce qui. Assai conosciuto e meritatamente studiato e celebrato, è stato quello delle infermiere volontarie della Croce Rossa, le cosiddette crocerossine, anche per effetto dei prestigiosi nomi di alcune di loro. Valga per tutte quello della duchessa d'Aosta, Elena d'Orléans¹⁷. Si è scritto che il loro è stato «il ruolo maggiormente riconosciuto alle donne nella Grande Guerra»¹⁸: è sempre difficile fare bilanci e graduatorie di questo tipo, è però indubbio che il loro contributo è stato alto e generoso¹⁹.

¹³ Ermacora, *Cantieri di guerra. Il lavoro dei civili nelle retrovie del fronte italiano (1915-1918)*, cit., p. 184.

¹⁴ Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 60.

¹⁵ Ermacora, *Cantieri di guerra. Il lavoro dei civili nelle retrovie del fronte italiano (1915-1918)*, cit., p. 116.

¹⁶ Dallonda Casadei, *La donna nelle due guerre mondiali. Una storia nascosta*, cit., p. 9. Gibelli ha precisato al riguardo: «In complesso negli stabilimenti ausiliari le donne occupate erano circa 80 mila alla fine del 1916, salirono a 140 mila nel 1917, per toccare il massimo di quasi 200 mila alla fine della guerra», Gibelli, *La grande guerra degli italiani 1915-1918*, cit., p. 20.

¹⁷ Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 134.

¹⁸ *Ibid.*, p. 133.

¹⁹ P. Baronchelli Grosson, *La donna nella nuova Italia. Documenti del contributo femmini-*

3. *Chi erano le crocerossine?*

Di regola erano donne giovani, ma anche meno giovani, signorine o signore, di estrazione nobile oppure alto-media borghese, provenienti da ogni parte del Paese, con uno spiccato sentimento patrio, intenzionate ad offrire, a titolo interamente gratuito, la loro opera. Per essere “arruolate”, venivano infatti inserite nei ruoli della gerarchia militare, dovevano esibire l’autorizzazione o paterna o maritale e l’attestato di positiva conclusione di un corso di formazione con i prescritti esami. Insomma, dovevano essere abilitate a espletare quel delicato incarico²⁰. Ragion per cui la loro scelta non era espressione di un semplice impeto di generosità più o meno giovanile.

Molte di loro, giunte nelle zone di guerra, furono impegnate in attività di primo soccorso nelle immediate retrovie del fronte e dunque dovettero confrontarsi con scene raccapriccianti e molto stressanti sul piano umano e psicologico. Alcune, nei loro diari – valga per tutti il diario di Sita Camperio Meyer²¹ – non hanno mancato di rammentare le sofferenze strazianti dei feriti e l’angoscia dei soldati mutilati. Insomma, maturarono esperienze che cambiano radicalmente la loro vita, quando non la perdettero²².

Altre furono impegnate negli ospedali da campo o in quelli messi in piedi in ville, in scuole o in strutture riconvertite, nonché sui treni-ospedali o in quelli territoriali, per lungo-degenti in varie città del Paese. Si stima che si aggira-

le alla guerra, Milano, Quintieri, 1917; M.R. Cutrufelli, *Il Novecento delle Italiane. Una storia ancora da raccontare*, Roma, Editori Riuniti, 2001; S. Bartoloni, *Donne nella Croce Rossa Italiana tra guerra e impegno sociale*, Venezia, Marsilio, 2006; *Donne nella Grande Guerra*, Bologna, il Mulino, 2014.

²⁰ «Ogni crocerossina, per poter prendere servizio, era tenuta ad esibire l’autorizzazione rilasciata dal padre, dal marito o dal fratello e doveva partecipare ad un corso (il primo si tenne a Milano nel 1906, successivamente poi a Roma); in questo modo iniziava per loro quella che spesso era la prima esperienza al di fuori dell’ambiente familiare, un vero e proprio salto verso un mondo cruento e pericoloso. Solo alcune di loro avevano già affrontato precedentemente un primo contatto con un’esperienza dolorosa: quelle che avevano prestato soccorso ai terremotati di Messina». Cfr.: *Crocerossine nella Grande Guerra: cenni all’assistenza sanitaria nel primo conflitto mondiale*, in *Museo digitale. Foto, documenti, video ed approfondimenti sulla storia del Novecento*, <<https://www.museodidatticofiorini.it/2021/05/24/crocerossine-nella-grande-guerra/>> (ultimo accesso: 06.09.2034); S. Bartoloni (ed.), *Donne al fronte. Le Infermiere Volontarie nella Grande Guerra*, Roma, Jouvence, 1998; P. Scandaletti e G. Variola (edd.), *Le crocerossine nella Grande Guerra. Aristocratiche e borghesi nei diari e negli ospedali militari. Una via all’emancipazione femminile*, Udine, Gasparri, 2008. Cfr.: <*Crocerossine nella Grande Guerra 1915/1918*, in <<https://www.storiaememoriadibologna.it/archivio/eventi/crocerossine-nella-grande-guerra>> (ultimo accesso: 06.09.2024).

²¹ S. Camperio Meyer, *La mia vita e le origini della nostra famiglia*, G. S. Rigo, G. Armocida (edd.), Firenze, Edizioni Tassinari, 2014; S. Camperio Meyer, *Luci ed ombre di eroi. Dal diario d’infermiera in zona d’operazione. Guerra italo-austriaca*, Torino, Bocca, 1932. Il diario fu scritto nel 1917.

²² Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 134.

rono sui due milioni le persone assistite a livello ospedaliero o curate a quello ambulatoriale, non solo per cause strettamente legate al conflitto ma anche per malattie collaterali – tifo, colera, tubercolosi e poi per la terribile spagnola – malattie favorite dalle precarie condizioni igieniche, dalla scarsa nutrizione, dal quotidiano stress²³.

Le crocerossine svolsero anche mansioni assistenziali, oltre a quelle di cura, come l'espletamento della corrispondenza di quanti non sapevano né leggere né scrivere o non erano in grado di farlo. Quando possibile, intrattenevano e distraevano i degenti con la lettura di qualche racconto o con qualche breve passeggiata. Dovettero inoltre scrivere molte lettere ai genitori e alle mogli di soldati caduti, per annunciare loro la scomparsa del congiunto. Cercarono le parole più delicate, spesso elogiative per il defunto, al fine di rendere la notizia il meno devastante possibile. Non a caso «Vennero definite 'le volontarie della pietà'»²⁴.

Alcune sono state, meritatamente, insignite di medaglie d'argento o di bronzo e, in alcuni casi, della prestigiosa *Florence Nightingale*, ovvero della medaglia conosciuta in onore della fondatrice inglese dell'assistenza infermieristica. È opportuno infine ricordare che a una crocerossina, Margherita Kaiser Parodi Orlando, nipote del ministro Vittorio Emanuele Orlando, venne riservato l'onore, per la sua abnegazione nella cura dei malati di spagnola, di cui lei stessa morì a soli 21 anni, di essere sepolta nel monumentale Sacrario di Redipuglia, accanto a centomila soldati italiani²⁵.

4. *Fra phisique e moral*

Tuttavia, altre donne ancora si sono prodigate per dare sostegno e conforto ai soldati nelle zone di guerra. Non è che di loro non si sia scritto o detto, caso mai lo si è fatto poco e con minor enfasi o, come nel caso di una delle due fattispecie cui accennerò, anche con un malcelato imbarazzo. In sintesi si può dire che, se le crocerossine si occuparono in prima istanza *du phisique* di chi combatteva, queste altre si mobilitarono o furono prontamente mobilitate dai vertici militari, per sostenere *le moral* dei soldati, ovvero per contrastare l'ansia, l'angoscia, la depressione, stati d'animo insidiosi al pari del nemico e sempre in agguato.

Non può pertanto sorprendere che il Comando Supremo del Regio Esercito

²³ *Ibid.*, p. 140.

²⁴ *Crocerossine nella Grande Guerra: cenni all'assistenza sanitaria nel primo conflitto mondiale*, cit.

²⁵ *Margherita Kaiser Parodi*: <https://it.wikipedia.org/wiki/Margherita_Kaiser_Parodi> (ultimo accesso: 28.09.2024).

si affrettasse a distanza di poco più di quindici giorni dall'inizio del conflitto, il che sottolinea la cogenza del problema, a diramare la Circolare n. 268 dell'11 giugno 1915, intitolata *Vigilanza e disciplina del meretricio*. Essa era volta a regolamentare questo delicato aspetto della vita al fronte, riconoscendo automaticamente un ruolo determinante non solo alla sessualità dei soldati ma anche alle cosiddette *femmes de plaisir*. Nonostante la notoria religiosità di Luigi Cadorna, tale circolare, del tutto scevra da moralismi o da intenti di contenimento delle pratiche sessuali dei soldati, acuite dalle stesse condizioni estreme di vita, interveniva a dare tassative indicazioni per regolamentarle e prevenire così la diffusione delle temute malattie sessuali, che in passato avevano decimato interi eserciti.

Ignorando le proteste e i mugugni delle autorità religiose centrali e periferiche, tale Circolare nei fatti dava una sorta di benedizione di Stato alle prostitute di professione e alla nascita di una rete di postriboli, sistemati in «appositi locali posti sotto la vigilanza dell'Autorità Sanitaria Militare ed accessibili soltanto ai militari». Vi si aggiungeva: «Ciò anche a scongiurare, per quanto possibile, che i militari si affidino alle prostitute clandestine che pullulano un po' dappertutto sotto le apparenze più diverse, e che costituiscono il contrabbando più pericoloso e più sfuggente al controllo sanitario e dell'agente di polizia»²⁶.

Tali 'appositi locali', di qualità ambientale e umana varia, a seconda del grado e dello status dei possibili frequentatori – ufficiali, sotto-ufficiali, soldati – erano nel complesso luoghi deprimenti e tristi, dove donne giovani o non più tali, venivano sottoposte a prestazioni intense se non massacranti, in una sorta di catena di montaggio del sesso, spersonalizzante per non dire schiavizzante. È vero che queste donne ricevevano un compenso per le loro prestazioni, ma non poteva non ferirle e umiliarle il disconoscimento per non dire il disprezzo riservato loro. Eppure, chi potrebbe negare l'utilità della loro funzione nei teatri di guerra? Ciò nonostante, solo raramente tale squarcio di realtà è stato approfondito con obiettivo distacco, come sarebbe stato necessario. Fra questi pochi si situa sicuramente il documentato e accurato lavoro di Emilio Franzina, *Casini di guerra*, che mette a nudo una realtà squallida, di mercificazione della donna, ma non trascura di sottolinearne l'indubbio servizio reso alla patria²⁷.

Le «case di tolleranza», anche dette «bordelli di guerra» e in molti altri coloriti e dissacranti modi, non furono comunque le uniche infrastrutture messe rapidamente in piedi per l'organizzazione delle ore del *loisir* dei militari, ritenuto di fondamentale importanza. Sorsero infatti, piuttosto celermente, altre

²⁶ Per tale Circolare, cfr.: E. Franzina, *Casini di guerra*, Udine, Paolo Gaspari ed., 1999, p. 143. Per la tematica in generale: A. Cegna, N. Mattucci, A. Ponzio (edd.), *La prostituzione nell'Italia contemporanea. Tra storie, politiche, diritti*, Macerata, eum, 2019; L. Azara, L. Tedesco (edd.), *La donna delinquente e la prostituta. L'eredità di Lombroso nella cultura e nella società italiane*, Roma, Viella, 2019.

²⁷ Cfr.: Franzina, *Casini di guerra*, cit.

case, come le «Case del soldato», ovvero centri di ricreazione dove i militari potevano ritrovarsi, intrattenersi e distrarsi, anziché vagabondare per le strade e nelle piazze dei luoghi in cui erano di stanza. Case che avevano finalità del tutto diverse dalle precedenti, in quanto miravano a coniugare la funzione ricreativa con quella educativa.

Le «Case del soldato» furono «ideate e aperte dal cappellano militare padre Giovanni Minozzi» e presero a fiorire nei piccoli come nei centri urbani più importanti²⁸. Furono anch'esse di varia grandezza e di diversa qualità a livello organizzativo e propositivo. Suddivise per Armata, la loro realizzazione e la gestione della connessa attività era affidata al Comandante. «Le più grandiose erano dotate di un salone per gli spettacoli, sale di lettura, sale di musica, giochi da tavolino», e persino di una sala cinematografica, con la necessaria attrezzatura per la proiezione e le pellicole che venivano via via rinnovate²⁹.

Anche in queste Case la presenza femminile fu assidua, indirettamente o direttamente: ossia mediante pellicole filmiche o cortometraggi – valga per tutte il nome di Elvira Coda, legato ad apprezzati film muti³⁰ – oppure mediante rappresentazioni teatrali. È questo il caso di Emma Gramatica, di madre fiu-mana che, pervasa da un profondo sentimento patrio, si recò anche in minuscoli e modesti centri, pur di sostenere l'umore dei soldati³¹. Oppure quello di Tina Di Lorenzo, all'epoca assai richiesta e nota come *Encantadora* dopo una tournée in Argentina, dove si era guadagnata quell' appellativo per la sua voce vellutata³². Il nome, tuttavia, più noto e ambito fu quello di Eleonora Duse, soprannominata non a caso «la divina». Amatissima dal pubblico, nonostante l'età non più giovane, all'epoca del primo conflitto mondiale aveva oltre 55 anni, continuava ad essere la più richiesta³³. Va non di meno ricordata la milanese Dina Galli, cui la già citata rivista «la donna» riservò, insieme all'attore Amerigo Guasti, la copertina del 20 maggio 1916, dove veniva elogiato espressamente il loro impegno³⁴. Tuttavia, i nomi qui richiamati non sono che una piccola rappresentanza delle molte attrici o attricette che recitarono nelle «Case del soldato» e negli ospedali, per dare conforto e ravvivare lo spirito patrio negli astanti.

²⁸ E. Spilani, *Le Case del Soldato alla fronte della III Armata*, «La Lettura», n. 11, novembre 1918, pp. 827-829; Gibelli, *La grande guerra degli italiani 1915-1918*, cit., p. 132.

²⁹ Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 118.

³⁰ Elvira Coda fu una vera e propria «pioniera d'eccellenza nella regia e nella imprenditoria cinematografica napoletana», *Ibid.* Per la produzione filmica del periodo, cfr.: Gibelli, *La grande guerra degli italiani 1915-1918*, cit., pp. 261 ss.

³¹ Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 119.

³² <https://it.m.wikipedia.org/wiki/Tina_Di_Lorenzo> (ultimo accesso: 14.08.2024).

³³ <https://it.m.wikipedia.org/wiki/Eleonora_Duse> (ultimo accesso: 14.08.2024).

³⁴ Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 120.

5. *Madrine del soldato e/o madrine di guerra*

Dunque, diverse furono le categorie di donne attive o attivate per sostenere il morale dei militari. Fra di esse un posto spetta a pieno titolo alle già citate madrine del soldato, dette in seguito di guerra. Come accennato, scrivevano lettere o spedivano pacchi-dono, nel quadro di quel fronte patriottico interno che venne rafforzandosi per il complicarsi e il protrarsi del conflitto, al fine di testimoniare vicinanza e solidarietà a chi era nelle trincee. Ma se in Francia, come abbiamo precisato, il madrinato o madrinaggio che dir si voglia, si estese rapidamente senza ostacoli, da noi non parrebbe essere andata così.

Nella storiografia esistente, di regola si glissa su questo aspetto, così come non si parla della consistenza che ha avuto, se non in termini generici. Il saggio che esamina più criticamente la questione è di Augusta Molinari, *La buona signora e i poveri soldati. Lettere a una madrina di guerra (1915-1918)*. È un lavoro di microstoria, dove tuttavia si afferma esplicitamente che «non si dispone a tutt'oggi di indicazioni utili a valutare le dimensioni e le caratteristiche assunte in Italia dall'attività del madrinato, né tanto meno a cogliere il profilo delle madrine (età, stato anagrafico, provenienza sociale)»³⁵. Il fenomeno non era e non è invero di facile quantificazione, trattandosi di una pratica di tipo privato, nel cui espletamento c'era anche chi voleva preservare la più assoluta privacy o utilizzava nomi fittizi.

Augusta Molinari accenna pure a resistenze al riguardo. Ma poiché il suo saggio era volto a ricostruire l'attività di Bianca Erizzo Giglio, un'impegnata madrina genovese, non era per lei cogente un approfondimento generale della questione. Sono almeno due i passaggi in cui la storica evidenzia l'esistenza di perplessità diffuse e di varia provenienza, per ragioni diverse e distanti. Intanto, «di gran parte delle organizzazioni femminili, in particolare [...] cattoliche», che pur essendo assai impegnate in compiti di assistenza ai soldati e ai loro familiari, «indirizzava[no] verso altre attività il volontariato femminile»³⁶.

Non è del resto difficile immaginare che nella corrispondenza si intravedessero rischi multipli, fra cui quello di una eccessiva liberalità nei rapporti fra uomini e donne, con implicazioni durature sul costume, oltre ad altre contingenti di tipo morale e sessuale. Da un primo, rapido esame della stampa giornalistica dell'epoca, ci sembra di poter evincere che le accennate resistenze promanassero tuttavia da molti ambienti e non solo da quelli cattolici. Non a caso, come afferma sempre Augusta Molinari, «La figura della madrina non venne in genere istituzionalizzata dalle associazioni e dai comitati patriottici»³⁷.

In altri termini, costituendo la corrispondenza epistolare una pratica inusi-

³⁵ A. Molinari, *La buona signora e i poveri soldati. Lettere a una madrina di guerra (1915-1918)*, Torino, G. B. Paravia, 1998, p. 21.

³⁶ *Ibid.*, p. 22.

³⁷ *Ibid.*, p. 23.

tata, essa si poneva, come accennato, in rotta di collisione con i modelli passati e presenti dei rapporti fra uomo e donna, modelli in sintonia con un Paese culturalmente e ideologicamente tradizionalista e arretrato. Anche negli stessi ambienti militari e in quelli patriottici, pare di poter affermare che si guardava con una certa freddezza o diffidenza a tali scambi epistolari.

Ad impegnarsi favorevolmente furono invece alcuni ambienti del giornalismo femminile, fra cui la rivista «la donna» che – sulle orme della stampa francese, come abbiamo accennato all'inizio – non mancò nel corso del 1916 di sottolineare con convinzione l'alto significato «di carità e d'amore» che promanava dalla corrispondenza.

Particolarmente solerte fu proprio la già citata Jeannette che intervenne più volte a riguardo e in specie nel giugno del 1916, con un lungo e documentato articolo, intitolato *La Madrina del soldato*, anch'esso richiamato all'inizio. Merita rilevare che la rivista, proprio in quell'anno, si era resa indipendente da «La Stampa» di Torino e da «La Tribuna» di Roma, con cui aveva debuttato come supplemento, meglio dire come moderno *magazine*, a partire dal dicembre 1904, ri-comparendo con il titolo di una precedente rivista ottocentesca, di ispirazione mazziniana, senza però ereditarne né il taglio né l'orientamento, se non quello dell'emancipazione femminile³⁸.

Nel 1916, poi, essa non solo si rese indipendente dai due periodici di Torino e Roma, di orientamento liberal-giolittiano e pertanto sostanzialmente neutralistico rispetto al conflitto in corso, ma assunse addirittura il sottotitolo di «Bollettino quindicinale illustrato dell'opera femminile italiana per la guerra», schierandosi nettamente a sostegno del conflitto³⁹.

Non siamo riusciti, nonostante una ricerca multidirezionale, a capire né come si sia giunti a tale scelta né chi l'abbia effettuata, nonché chi si assunse l'onere del successivo finanziamento e della distribuzione. Quello che invece

³⁸ Va precisato che di solito viene indicata come data d'inizio della rivista il gennaio 1905, ma la retrodatazione compare nel lavoro più accurato esistente al riguardo: Alesi, «*La Donna*» 1904-1915. *Un progetto giornalistico femminile di primo Novecento*, cit., pp. 43-63.

³⁹ La rivista «La Donna», già in distribuzione nel dicembre 1904, è comparsa ufficialmente a Torino il 1° gennaio 1905, riprendendo l'intestazione, ma non la linea, di un precedente periodico femminile d'ispirazione mazziniana, edito a Padova fra il 1868 e il 1891. Vantò collaboratori di prestigio, fra cui Ugo Ojetti, Ada Negri, Sergio Tofani etc. Fu inizialmente diretta da Nino Giuseppe Caimi e fra le collaboratrici ci furono Felicita Rey Ragazzoni, Marianna Clelia Abate Arcostanzo, Elisabetta Oddone e Ester Danesi Traversari. Nel 1916 divenne una testata indipendente, con una propria ragione sociale, sempre quindicinale e sulla copertina comparve un sottotitolo che ne evidenziava inequivocabilmente l'orientamento: «Bollettino quindicinale illustrato dell'opera femminile italiana per la guerra», mutato, poi, l'anno successivo in «Bollettino dell'attività femminile italiana per la guerra». Nel 1917 il periodico divenne mensile, Cfr.: <[https://it.wikipedia.org/wiki/La_Donna_\(rivista_1905\)](https://it.wikipedia.org/wiki/La_Donna_(rivista_1905))> (ultimo accesso: 25.08.2024); <<https://bibliotecadelledonne.women.it/rivista/la-donna-rivista-quindicinale-illustrata/>> (ultimo accesso: 08.09.2024). Di particolare interesse è la ricostruzione accurata, fino al 1915, in: Alesi, «*La Donna*» 1904-1915. *Un progetto giornalistico femminile di primo Novecento*, cit., pp. 44 ss.

è noto, e l'abbiamo detto en passant, è che nei movimenti femministi, si era fatto via via meno severo il rifiuto della guerra, perché alcune aderenti vi intravedevano l'opportunità per le donne di poter essere riconosciute nel loro valore politico e sociale e di riuscire così a perseguire, finalmente, alcuni degli obiettivi attesi da tempo, come il voto amministrativo e quello politico.

Una delle protagoniste più note e attive al riguardo fu Teresa Labriola, figlia del noto Antonio, esponente socialista e neutralista, la quale, allontanandosi dal padre, aderì al movimento interventista e si fece promotrice, ovviamente insieme ad altre esponenti, di una Lega femminile di adesione e di appoggio all'intervento in guerra, di cui fu pubblicato un appello proprio su «La Stampa», nel dicembre 1915, da lei firmato insieme a Nina Zenatti⁴⁰. Sarebbe assai interessante approfondire, in virtù di una ancora più prolungata ricerca, se ci furono rapporti con la rivista «la donna» e con il salotto cui la rivista femminile aveva dato vita a Torino a partire dal 1910, quale luogo di incontri culturali e di scambi⁴¹. È una pista di sicuro interesse storico-pedagogico e scientifico in genere, che merita di essere percorsa.

Quanto a Jeannette, figlia di un colonnello dei bersaglieri e moglie del giornalista Ernesto Ragazzoni, come già accennato precedentemente, nella rivista «la donna» aveva un ruolo importante e curava più di una rubrica⁴². A favore del madrinato, vi svolse una vera e propria crociata, riservando alla corrispondenza un'attenzione speciale e parole rassicuranti e cariche di fiducia nei confronti dei suoi benefici effetti: «È [...] un'onda continua di forza e di coraggio che dalle tenere e buone lettere femminili si comunica ai combattenti. Ond'io mi domando se non sarebbe opportuno in Italia stabilire pure simili rapporti epistolari per rallegrare e ingentilire un po' la rude esistenza dei nostri difensori».

Da ciò si evince che, fino a quel momento, tale pratica o non aveva avuto inizio da noi o, al più, era attiva sottotraccia. Per conferire maggiore incisività al proprio appello, Jeannette pubblicava una delle molte lettere di ufficiali giunte alla redazione della rivista, volte a sollecitare le lettrici ad avviare una corrispondenza⁴³. Non trascurava poi di contraddire, se pur in modo garbato,

⁴⁰ Cfr.: *Appello all'intervento della lega femminile*, «La Stampa», n. 354, 22 dicembre 1915, p. 4. È possibile trovare il testo dell'appello anche in: Bertolo, *Donne nella Prima Guerra Mondiale. Crocerossine, lavoratrici, giornaliste, femmes de plaisir, eroine, madrine ...*, cit., p. 14.

⁴¹ Per la costituzione di un salotto per gli incontri, cfr.: Alesi, «*La Donna*» 1904-1915. *Un progetto giornalistico femminile di primo Novecento*, cit., pp. 45, 49.

⁴² Jeannette, ovvero Felicita Rey Ragazzoni curava regolarmente una rubrica di moda, sotto lo pseudonimo di Lady Smart e un'altra di «toiletta e bellezza», come Jeannette. Faceva inoltre interventi su vari temi, come quello delle madrine. Cfr.: Alesi, «*La Donna*» 1904-1915. *Un progetto giornalistico femminile di primo Novecento*, cit., p. 44.

⁴³ Su «Il corriere della sera» del 7 novembre 2017 abbiamo trovato un articoletto, a firma di Silvia Morosi e Paolo Rastelli, intitolato *La storia scritta dalle madrine di guerra* in cui si riportava lo stralcio di un precedente articolo: *Per trovare madrine ai combattenti*, che lo si indicava tratto da «L'avvenire d'Italia» del 28 marzo 1916. L'indicazione ci aveva molto interessato, oltre

ovvero senza indicare né il nome né la testata, un collega che, pur approvando l'impegno delle *marraines des poilus*, alias «madrine del soldato» in Francia, osservava che in Italia i combattenti non avevano alcun bisogno di tale supporto perché nessuno era dimenticato e perché «ognuno trova[va] gioia e conforto nella bontà e nelle cure del suo tenente».

Alle implicite ma evidenti riserve del collega, Jeannette rispondeva con tono leggero:

Del resto, se anche queste corrispondenze di guerra acquistano soavi tinte un po' idilliache, un tono alquanto romanzesco, che gran male ci sarà? Finita la guerra, si ristabilirà l'equilibrio anche nelle immaginazioni. La vita normale, gli affari sono potenti revulsivi, e se anche qualche idillio continuerà in forma di buona amicizia o condurrà i due partners fino ai fiori d'arancio, noi non avremo nulla da ridire. Che Iddio li benedica!⁴⁴

E chiudeva la sua lunga perorazione con un ottimistico auspicio: «Sono sicura che ogni lettrice di Donna vorrebbe avere il suo soldato da confortare e alleviare»⁴⁵.

Il madrinato, come già detto, prese a compiere piano piano i suoi primi passi nel corso del 1916 anche da noi, con tutta probabilità fra le donne maggiormente emancipate, molte delle quali curavano fra l'altro da tempo in privato la scrittura e molte desideravano avere un loro peso e una visibilità sociale. Non è neppure da escludere che, spinte del desiderio di dare un loro contributo in un frangente così importante, alcune abbiano preso a corrispondere in modo spontaneo e silente. Ce lo conferma in parte la stessa Jeannette in un successivo articolo, dove, oltre a dare indicazioni sulle modalità più idonee a un positivo e corretto scambio epistolare, pubblicava un elenco nominativo di lettrici che già lo effettuavano, aggiungendo che molte altre lo stavano facendo, ma preferivano l'anonimato⁴⁶. Dunque, è legittimo pensare che il fenomeno possa avere avuto una consistenza superiore a quella, comunque significativa, correntemente attribuitele. Tuttavia, proprio la natura privatistica di quei rapporti non ne agevolerebbe neppure oggi la quantificazione, qualora venisse deciso di effettuarla.

che per il tema, per la fonte e per la data. Ad una attenta verifica però è risultato che l'indicazione non era esatta. Abbiamo esteso la ricerca ai mesi precedenti e a quelli successivi, senza alcun risultato. Questa avvertenza al fine di evitare ad altri la stessa inutile ricerca.

⁴⁴ Jeannette, *La Madrina del soldato*, cit.

⁴⁵ *Ibid.*

⁴⁶ Jeannette, *Le madrine del soldato di "Donna"*, «La Donna», n. 290, 15 febbraio 1917, p. 23.

6. *Due forme di madrinato*

Durante il conflitto '15/'18, la dicitura «madrine del soldato» comprendeva almeno due tipologie di scambio, l'una rivolta ai soldati semplici, e l'altra diretta invece a ufficiali e a sottoufficiali. Una distinzione necessaria perché implicava modalità di interazione diverse. Nel primo caso, il madrinato «non avrebbe dovuto andare oltre uno scambio burocratico», ossia non prevedeva alcuna forma di corrispondenza ma solo l'invio di pacchi ai soldati semplici, spesso figli di famiglie indigenti, che, in quanto tali, non potevano alleviare in alcun modo i disagi ai loro congiunti⁴⁷. L'invio del pacco avveniva comunemente dietro richiesta di qualche prete o di qualche benefattore ai Comitati patriottici, che erano nati, non solo ma anche, per azioni di sostegno e collegamento fra i militi e le loro famiglie. Si trattava di un beneficio che non veniva erogato indistintamente ma o per qualche merito o per buona condotta, oltre che per particolare indigenza. I Comitati incaricavano poi una delle signore o signorine che avevano dato la propria disponibilità al riguardo, affinché provvedesse in merito. Tuttavia, il contatto doveva restare «nei limiti previsti dalle procedure assistenziali»⁴⁸, ossia non dar luogo a corrispondenza di sorta.

L'invio del pacco era fra l'altro disciplinato da precise norme dettate dai comandi militari, secondo cui poteva contenere soltanto «(...) calze di lana, guanti di lana, maglioni di lana uso ciclista, panciere di lana, agrumi, cognac, marsala, cioccolato, frutta secca, sapone, taccuini, matite copiative, carta da lettere»⁴⁹. Spesso però i beneficiari consideravano il pacco come dono della provvida signora il cui nome compariva, essendo la spedizione in contrassegno, nell'allegata cartolina postale, e talvolta non si limitavano, in risposta, a confermare la semplice ricezione del pacco, ma scrivevano biglietti pieni di riconoscenza, dando prova di uno sforzo immane essendo semianalfabeti.

Poiché la madrina non dava seguito allo scritto, volendo mantenere il rapporto nell'ambito di «uno scambio burocratico», non mancarono casi in cui si generò disappunto e sofferenza⁵⁰. Augusta Molinari, nel suo citato saggio, riporta il contenuto di una cartolina postale dell'aprile del 1916, che dà conferma di questi fraintendimenti: «Gentilissima Signorina io / sono molto inpen-sierito periguardo / di questo lungo silenzio che mi fate / perché io non posso ricevere più una / Cartolina da voi? / io vi ho mandato un'altra Cartolina e non mi avete fatto risposta»⁵¹.

Il fatto è che chi era al fronte e tutti i giorni rischiava la vita, aveva maturato una diversa coscienza di sé, della scala gerarchica e di tutti i vincoli

⁴⁷ Molinari, *La buona signora e i poveri soldati. Lettere a una madrina di guerra (1915-1918)*, cit., p. 17.

⁴⁸ *Ibid.*, p. 18.

⁴⁹ *Ibid.*, p. 17.

⁵⁰ *Ibid.*

⁵¹ *Ibid.*, p. 20.

sociali pregressi e non si accontentava affatto di una sorta di risarcimento assistenzialistico, stabilito dall'alto. Cioché ci fu chi, infrangendo le regole, avanzò richieste o di tipo materiale – un orologio, del denaro, etc. – o di tipo relazionale, che imbarazzavano le madrine, non sempre all'altezza di gestire tali situazioni, invero in sé non facili e delicate. A Genova, ad esempio, gli stessi comandi militari si manifestarono già nel corso del 1916 preoccupati dell'andamento dell'invio dei pacchi e l'avocarono, affidandolo all'Ufficio Doni dell'esercito⁵².

Ben diversa fu la qualità e l'intensità del madrinato svolto nei confronti degli ufficiali o dei sottoufficiali. Essi erano di regola di buona famiglia e avevano studiato, come la madrina stessa, cosicché la corrispondenza era più agevole e di soddisfazione reciproca e produceva spesso una sintonia che non raramente originava «legami affettivi», talvolta anche amorosi e un «sostegno morale e psicologico» più efficace⁵³. In questo caso, non era previsto l'invio di alcun pacco e quando ciò avveniva, «assumeva un valore simbolico, di attestazione di presenza» e dentro potevano trovarvi posto libri o una sciarpa, ma non certo indumenti e meno che mai intimi. In altre parole, l'ufficiale o il sottoufficiale «entrava a far parte dell'universo affettivo della madrina, era un 'figlioccio'. Il soldato ne era escluso [...]»⁵⁴.

In relazione al primo conflitto mondiale, non si sa con precisione se gli scambi epistolari abbiano dato luogo a incontri e poi a rapporti affettivi stabili che si sono conclusi con il matrimonio. Se ne accenna qua e là, ma senza precisi riscontri. Quasi certamente è successo, perché la corrispondenza avveniva di preferenza, non casualmente, fra corregionali o concittadini, per cui era più agevole il conoscersi nel corso di eventuali permessi. Che tale corrispondenza abbia avuto felici sviluppi, alla fine della Seconda guerra mondiale, è invece certo, come documentano alcune pubblicazioni di questo tenore⁵⁵.

7. Una strategia di sopravvivenza

Il madrinato che si sviluppò durante il secondo conflitto mondiale seguì in larga misura le orme di quello precedente ma in questo caso a sollecitarlo furono innanzitutto gli organi del regime. Ad esempio, le organizzazioni femminili fasciste, con ampia pubblicità sulla relativa stampa ma anche su altre testate

⁵² *Ibid.*, p. 19.

⁵³ *Ibid.*, p. 18.

⁵⁴ *Ibid.*

⁵⁵ C. Colli, *Cara madrina. La corrispondenza epistolare tra propaganda e sopravvivenza durante il secondo conflitto mondiale*, Milano, Lampi di stampa, 2011.

coeve. Dunque, vi fu un avvio organizzato, non lasciato al caso. È inoltre durante il fascismo che si parla di «madrine di guerra».

Strada facendo, furono coinvolte anche le organizzazioni giovanili della GIL (Gioventù Italiana del Littorio), i dirigenti scolastici e gli insegnanti che invitarono le studentesse a compiere atti di solidarietà e di vicinanza a chi combatteva, resisi necessari anche dall'andamento infelice della guerra. E, ovviamente, le risposte di giovani ufficiali, scapoli e non fidanzati, non si fecero un'altra volta attendere. Alcuni presero a corrispondere addirittura con più madrine, in quanto la corrispondenza era una strategia di sopravvivenza, come è stato efficacemente affermato. «Se ne accorsero ben presto i censori – circa settemila, tra impiegati, insegnanti, avvocati e soprattutto militari, chiamati in servizio [...] – che, nel giro di un anno, videro il volume della corrispondenza più che triplicare, raggiungendo cifre assolutamente non comparabili col livello di alfabetizzazione»⁵⁶. Il che significava che c'era chi scriveva per procura. Loris Rizzi ha affermato che alla fine del 1942, quindi dopo due anni e mezzo dall'inizio del conflitto, la media della corrispondenza inviata ammontava a oltre nove milioni di lettere al giorno⁵⁷.

Ma l'iniziale entusiastico slancio degli organi centrali fascisti non si protrasse a lungo. Già nella primavera del '41, quindi dopo neppure un anno, cominciarono i primi segnali di perplessità e disappunto, confermati da alcune comunicazioni interne, fra i vari organi governativi e periferici, perché la corrispondenza aveva preso una piega del tutto inattesa. A sottolinearlo furono innanzitutto le Commissioni provinciali addette alla censura che si videro costrette a segnalare le loro riserve sul madrinato per più ragioni. Innanzitutto, perché risultava che molte prostitute avevano preso a spacciarsi per madrine, tant'è che parecchie lettere, non solo contenevano frasi imbarazzanti, ma persino disegni e immagini porno⁵⁸.

Ma se questo motivo consigliò una più stretta vigilanza ed anche di tagliar corto con la pubblicità che veniva fatta sulla stampa o da parte delle organizzazioni del partito, l'andamento stesso del conflitto, tutt'altro che favorevole com'era nei pronostici, fece emergere che tale corrispondenza, in larga misura ingovernabile per la dimensione assunta, potesse nuocere politicamente al fascismo, perché vi trasparivano, attraverso accorgimenti vari per eludere i

⁵⁶ E. Cortesi, *Reti dentro la guerra. Corrispondenza postale e strategie di sopravvivenza (1940-1945)*, Roma, Carocci, 2008, p. 162.

⁵⁷ L. Rizzi, *Strutture, funzioni e risultati della censura sulla posta (1940-1945)*, in G. Ro-chat, E. Santarelli, P. Sorcinelli (edd.), *Linea Gotica 1944. Eserciti, popolazioni, partigiani*, Milano, FrancoAngeli, 1986, p. 526.

⁵⁸ Cortesi, «*Madrine di guerra*» italiane: gli anni del secondo conflitto mondiale, «*Memoria e Ricerca*», n. 9, gennaio-aprile 2002, p. 161. Per il problema della prostituzione nel periodo fascista: A. Cegna, *Donne pubbliche. Tolleranza e controllo della prostituzione nell'Italia fascista*, Roma, Viella, 2024.

controlli, notizie militari di ripiegamenti, insuccessi, disagi, sofferenze e insofferenze crescenti.

In breve, fin dal '41 cominciarono ad essere diramati fogli d'ordine volti a contenere al massimo il madrinato, che, a dispetto delle attese dei vertici fascisti, Mussolini incluso, non conobbe però battuta d'arresto. E come attestano alcune pubblicazioni al riguardo, in particolare quella davvero molto documentata di Elena Cortesi, *Reti dentro la guerra*, la mole delle lettere, delle cartoline, insomma degli scambi, anziché decrescere, nel corso del conflitto, prese ad aumentare, costringendo le Commissioni di censura a un lavoro gigantesco, all'origine anche dei ritardi biblici lamentati nella consegna o addirittura nella sparizione di molte lettere. In breve, nonostante tutti gli ostacoli e gli inciampi volti a scoraggiarlo, il madrinato non si arrestò, essendo la corrispondenza, per chi combatteva, «preziosa come l'aria», come ebbe efficacemente a definir-la Nuto Revelli⁵⁹. Ed è altresì accaduto che in diversi casi, anche se non si sa per la verità in quanti, essa portò ai fiori d'arancio⁶⁰.

⁵⁹ Cortesi, *Reti dentro la guerra. Corrispondenza postale e strategie di sopravvivenza (1940-1945)*, cit., p. 59.

⁶⁰ F. Leo, A.M. Marucelli, *Scrivimi molto e a lungo*, Milano, Terre di Mezzo, 2014.

Examining Folkloric Elements in the Educational Works of Kasym Tynystanov: A Scholarly Identification and Analysis

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ABSTRACT: Kasym Tynystanov (1901-1938) was a pivotal figure in early 20th-century Kyrgyz literature and education. His works, beginning with «Окуу Китеби» [*Reading Book*] in 1924, aimed to teach literacy using folkloric elements. «Окуу-Жазуу Бил» [*Learn to Read and Write*] and «Биздин Тил» [*Our Language*] blended grammar instruction with cultural content. Tynystanov's textbooks infused folklore to foster national consciousness and preserve Kyrgyz heritage. His contributions significantly shaped the Kyrgyz/Soviet education system, enriching the understanding of Kyrgyz cultural heritage and ancient Turkic folklore, solidifying his legacy as a bridge between literature, education, and cultural preservation.

EET/TEE KEYWORDS: Soviet Education; Kasym Tynystanov; Kyrgyz Folklore; Kyrgyzstan; Central Asia; XX Century.

Introduction

Kyrgyzstan is a country located in Central Asia. The history of this country is known at least since the 17th century. Initially, it was under the dominion of the Russian Empire during the 19th century and later by its successor, the former Soviet Union. Regarding its indigenous people, the Kyrgyz were transhumant nomads in the past; however, they were sedentarized by the Soviet government through policies of agricultural collectivization and industrialization.

Formal education in Kyrgyzstan during the Soviet Union was heavily influenced by the ideology of the Communist Party, where the dominant language was Russian. Nevertheless, the lives of the Kyrgyz people in their homes were still influenced by their rich oral tradition. Therefore, during the Soviet period, Kyrgyz writers had to adjust their works according to the communist ideology, along with the literary trend of socialist realism.

Kasym Tynystanov frequently incorporated folkloric elements into his scholarly and cultural works. It is evident that Tynystanov's works, intended as textbooks for schools, have made significant contributions to the cultural development of broad segments of the population. Furthermore, since Tynystanov documented folkloric elements in written form, these works, in addition to their other characteristics, hold the distinction of being the first compilation studies within the scope of Kyrgyz folklore.

Kasym Tynystanov's first work, titled «Окуу Китеби» [*Okuu Kitebi – Reading Book*], was printed in 1924 by the Turkestan State Printing House in the city of Tashkent. His second work, «Окуу-Жазуу Бил» [*Okuu-Jazuu Bil – Learn to Read and Write*], was published in 1927. Within the same year, Tynystanov's third work, «Bizdin Til», was released in Tashkent, using Arabic script. Tynystanov's fourth work, «Janı Aıyl» [*New Village*], printed in the Latin alphabet, was published in 1929 in Kyrgyzmambas, Frunze city. In 1932, Tynystanov's fifth work, «Til Sabagy» [*Language Lesson*], written in the Latin alphabet, was published.

These works by Kasym Tynystanov, apart from serving as educational tools, hold the distinction of being the pioneering compilation efforts within the realm of Kyrgyz folklore.

The new editions of Kasym Tynystanov's works could only be produced after the dissolution of the Soviet Union. Alongside «Bizdin Til» [*Our Language*], the works include literary texts written by Tynystanov himself or his contemporaries. The identification and analysis of the folkloric texts presented

in Kasym Tynystanov's works are crucial for gaining a deeper understanding of Kyrgyz folklore and detecting the traces of ancient Turkic folklore and mythology within Kyrgyz folklore. Folkloric products play a significant role in establishing social order, unity, and the transmission of cultural heritage. In imparting and conveying societal values, oral cultural heritage assumes a crucial role¹.

According to William R. Bascom, folklore serves four functions. Entertainment is the most crucial, followed by the second function, which is the affirmation of culture and the validation of rituals and institutions. The third function, particularly in non-literate societies, is educational. Folklore emerges as a primary element in the education of children in non-literate societies. The fourth function of folklore is to sustain accepted behavior patterns. In this context, it is evident that the folkloric texts in Kasym Tynystanov's scientific and cultural activities align functionally with Bascom's theory of folklore².

As an intellectual responsible for a society with very low literacy rates, Tynystanov desired that the new generations learn to read and write while being entertained. Although not entirely opposing Soviet teachings, he drew heavily from Kyrgyz folklore to ensure that the Kyrgyz people remained connected to their past and that the youth did not lose touch with their identity. The texts in Tynystanov's textbooks can be categorized into three main areas: pedagogical/ideological/didactic, literary, and folkloric.

1. Окуу Китеби [*Okuu Kitebi – Reading Book*]

Kasym Tynystanov's first work, written as a textbook and titled *Okuma Kitaby* [*Reading Book*], was published in Tashkent in 1924 using Arabic script. The sixteenth text in the work consists of riddles related to the human body.

«Кыдырата таш койдум, кызыл огузду бош койдум»

I placed a stone by wandering around, I left the red ox empty – *Tongue and Tooth*

«Тий десем тийбейт, тийбе десем тийет»

If I say it's worthless, it's not worth it; if I say it's worth It, it's valuable. – *Lips*

«Кара тоонун төбөсүн, кар башканын билдинби?»

¹ M. Bars, *Kültürel değerlerin aktarımında halk edebiyatı ürünlerinden yararlanma* [Using folk literature to transmit cultural values], «Erzincan Üniversitesi Sosyal Bilimler Enstitüsü Dergisi», vol. 10, n. 2, 2017, pp. 217-228.

² M. Bars, *William Bascom'un "Folklorun dört işlevi" ışığında Nasrettin Hoca fıkraları üzerine bir değerlendirme* [An evaluation of Nasrettin Hodja's tales in the light of William Bascom's 'Four Functions of Folklore'], «Turkish Studies International Periodical for the Languages, Literature and History of Turkish or Turkic», vol. 10, n. 4, 2015, p. 157.

Кайнар булак кашатты суу башканын билдинби?»

Do you know that snow covers the top of the black mountain?

Do you know that hot spring inundates the stream with its water? – *Grey hair and tears*³.

The dialogue between the child and the sparrow at the beginning of the work serves as an example of the fable genre and, at the same time, functions as a pedagogical text calling children to school.

«Бир кооз чымчык, канат кагып,
Учуп келди зыб, зып, зыб
Ир, ырдады күүгө салып:
‘Чирлит, чирлит, чит, чит чит’

«A beautiful sparrow flapped its wings
Flew and came with a chirp, chirp, chirp
It sang a song with its melody:
‘Chirp, chirp, chirp, chirp, chirp’

Бала:

Сулуулукту, зейректикти,
Мен да үйрөнүп алаин
Жол-жобосун айтып берчи,
Кайдан издеп табайын?

Чымчык:

Иштин баары тырыштыкта,
Бош чүрбөсөңг куру текке,
Зейректик да, сулуулук да,
Мектеб, мектеб, мектебте!»

Child:

Beauty and intelligence,
I want to learn them too.
Can you tell me the way?
Where can I find these?

Sparrow:

The whole thing is in effort,
Don't just stay idle.
Both intelligence and beauty,
In school, school, school»⁴.

In the text titled «Албарсты» [*Al basty*], Kasym Tynystanov's pedagogical protagonist, a young man named Abyl, begins to feel a heaviness in his chest in recent days. He explains the situation to his father, who tells him that the heaviness is due to *Al basty*. Abyl becomes frightened and believes in the existence of *Al basty*. He starts to confront *Al basty* every day. One day, he tells his teacher about the situation. The teacher advises him not to sleep without digesting his food. Abyl follows the teacher's advice, and *Al basty* no longer appears. In this text, Tynystanov directly addresses the reader, stating that it is a shame for educated people to believe in *Al basty*. He explains that if a person lies down dirty and messy without digesting their food, it slows down blood circulation. Slowed blood circulation makes it difficult for a person to breathe comfortably. The community refers to this condition as *Al basty*, but Tynystanov asserts that the existence of *Al basty* is an empty belief⁵. The teacher attempts to scientifically explain the issue of *Al basty* to the students. It is noteworthy that the teacher, a character, provides a scientific explanation for folk beliefs. Simultaneously, the teacher represents innovation, while the father represents tradition in the narrative. Tynystanov introduces these characters

³ K. Tynystanov, *Okuu kitebi*, Tashkent, 1924, p. 3.

⁴ *Ibid.*, p. 8.

⁵ A. Bektenov, A. Erkebayev, *Kasym Tynystan uulu. Adabiy ыығarmalar* [*Kasym Tynystan uulu. Literary works*], Bishkek, Adabiyat, 1991, p. 103.

to the reader. With this text, Tynystanov conveys the idea that various beliefs among the people should have a scientific explanation.

Al basty is defined in the Kyrgyz ethnography dictionary as follows: «In a religious sense, *Al basty* is considered to be the form of a jinn or devil in the shape of a woman. This religious belief has been present among the Kyrgyz people since ancient times. *Al basty* possession is described as a difficult state that occurs when a person, especially a woman who has lost a lot of blood during childbirth, falls into it at the moment when the heartbeats slow down, breathing becomes heavy, and they begin to have bad dreams while sleeping. Such beliefs stem from physiological events occurring in the human body»⁶. According to Basilov, *Al basty* can lead to illnesses, nightmares, and miscarriages. It usually takes the form of a repulsive-looking old woman, and it is particularly dangerous for women and children⁷.

From a folkloric perspective, Abyl's experience, as something that could happen to many people in their daily lives, can also be described as a *memorate* case. *Memorates* are defined as stories related to an individual's personal experience of a supernatural event, narrated by someone who has either lived through it or heard about it⁸. Swedish folklorist Carl Wilhelm von Sydow, who first considered *memorates* as a separate category from legends, coined the term in 1934 in connection with materials that, while discussed in relation to legends, were distinct in terms of personal and entirely individual experiences that did not align with the characteristic features and traditions of legends⁹.

The work includes a lullaby titled «Бөбөк Терметкендэ» [*Böbök termekende – Rocking the Baby*].

«Алдей, алдей бөбөгүм,
Ачууланба, ыйлаба;
Арка сүйөө чөлөгүм,
Абакенди кыйнаба».

«Come, come, my beloved
Don't get angry, don't cry;
My pillar of love,
Don't force your dear mother».

«Алдей, алдей бөбөгүм,
Алдей, алдей кыргызек,
Уктай койчу чөлөгүм,
Чарык умут, чаш тилек!»

Lullaby, lullaby, my baby,
Lullaby, lullaby, my little hawk
Listen, my support,
My light, my youthful wish!»¹⁰.

⁶ O. Karatayev, S.N. Eraliyev, *Kyrgyz etnografiyası boyunça sözdük* [*Dictionary of Kyrgyz Ethnography*], Bishkek, Biyiktik, 2005, p. 24.

⁷ V. N. Basilov, *Mifologičeskiy slovar. Albastı*, Moscow, 1990, p. 33.

⁸ R. Kvideland, H.K. Sehmsdorf, *Scandinavian Folk Belief and Legend*, Oslo, Norwegian University Press, 1991, p. 19.

⁹ C.W. Sydow, *Popular Traditions and Their Classification*, Selected Papers, edited by Laurits Bodker, Copenhagen, Rosenkilde and Bager, 1948, pp. 60-88.

¹⁰ K. Tynystanov, *Okuu kitebi*, Tashkent, 1924, p. 17.

The mentioned lullaby is among the first examples of lullabies documented in Kyrgyz culture.

In the narrative titled «Жомок» [*Jomok – Tale*], there is an old man named Jomok who constantly cries because he has lost his calf. Jomok's hair is mixed with his beard. His beard and mustache are so long that his mouth and nose are not visible. A person approaches him and asks, «Oh, Jomok your mouth is not visible, how do you eat?» Jomok responds, «Invite me to your house, then you will see my mouth». The man invites Jomok to his house, slaughters a lamb, and as Jomok eats meat, a wolf eats his calf. From then on, Jomok is referred to as «жөө жомок» [*jöö jomok*]. Tynystanov attempts a humorous explanation of the etymology of the term *jöö jomok*. In the tale, events are more complex and lengthier, and some tales can also be part of an epic. *Jöö jomok*, on the other hand, refers to a slightly shorter and smaller tale, with a simpler plot. In the Kyrgyz language dictionary¹¹ (*jöö jomok* is described as a tale told with black words. In Kyrgyz folklore, *jöö jomok* s are divided into categories of life, imaginary, and animal tales¹². At the end of *jöö jomok*, the good always triumphs, justice is established, and order is restored.

The narrative titled «Алдар Көсө» [*Aldar Kösö*] and the Devil is based on the proverb «Aldar Kösö was the devil's father, and even he deceived the devil». In the story, *Aldar Kösö*, who goes hunting with the devil, narrates with fantastical expressions that he was born before the devil, or more precisely, that he could be the devil's own son. Upon this revelation, the devil acknowledges *Aldar Kösö*'s rights and leaves him the bird they hunted together. Thus, *Aldar Kösö* manages to outsmart the devil.

Aldar Kösö is a common character in the oral literature of Kyrgyz and Kipchak-speaking peoples (Kazakh, Karakalpak, Nogai, Bashkir, Karachay, etc.). According to the Kyrgyz Ethnography Dictionary, he is described as «a clever and skillful hero frequently encountered in the oral literature of Kyrgyz and Kipchak-speaking peoples» (Kazakh, Karakalpak, Nogai, Bashkir, Karachay, etc.). The name *Aldar Kösö* is also used as a nickname. In the tales, there are humorous narratives related to *Aldar Kösö*, highlighting his comical actions. His real name is *Chagatay*. He stands out for deceiving stingy rich people, profit-seeking merchants, deceitful mullahs, female healers and soothsayers, and malicious leaders, which is why he acquired the name *Aldar Kösö*¹³.

The incident between *Aldar Kösö* and the *devil*, when defined as an event that occurs as a result of communication with *supernatural* beings and is nar-

¹¹ A. Akmatalliev *et alii*, *Kyrgyz Tilinin Sözdügü I (A-L), II (L-Ya)*, Bishkek, Avrasya Press, 2010, p. 484.

¹² A. Musayev, T. Üsönaliyev, *Kyrgyz adabiyaty 5 [Kyrgyz Literature 5]*, Bishkek, Insanat, 2012, p. 7.

¹³ Karatayev, Eraliyev, *Kyrgyz etnografiyası boyuncha sözdük*, cit., p. 27.

rated either by a person who has personally experienced and lived it or someone who has heard it from them¹⁴, can be considered a *memorate*.

In the work, there is a folk poem titled «Кайран Эл» [*Kayran El – Poor People*] related to the Үркүн [*Ürkün*] uprising. *Ürkün* is one of the names given to the uprising carried out by the Turkistan peoples against the Russian Empire in 1916. In some sources, it is also referred to as the 1916 Едису [*Yedisu*] uprising. In some Soviet-era scientific studies, it has been characterized as a rebellion against imperialism, a national movement, and a red resentment. However, in Kyrgyzstan and Kyrgyz literature, it is remembered as *Ürkün*.

The uprising mainly took place within the boundaries of *Western Turkestan*. The efforts of the *Russian Empire* to colonize *Turkestan*, the exploitation of the *Turkestan* territories by the *Tsarist regime*, the oppression of the local population by the appointed administrators, the privileged position of local collaborators, the forced migration of the people, and the allocation of new agricultural lands and wetlands to *Russian farmers* during the *First World War*, as well as the attempt to conscript local people into the army, are listed as the reasons that led to the uprising.

The uprising was ruthlessly suppressed by the *Tsarist regime*. The majority of those who survived were forced to migrate to *China*. After the establishment of *Soviet power* in 1917, the *Kyrgyz people* returned to their homeland. The *Ürkün* uprising had a significant impact on *Kyrgyz folk literature* and modern *Kyrgyz literature*. *Ürkün*, in oral literature, serves as a kind of turning point. The events that took place in the *Turkestan* region from the mid-19th century to the early quarter of the 20th century naturally found expression in the works of sensitive artists who closely followed the pulse of the people and society¹⁵. Figures of that time, such as *Aldash Moldo*, *Isak Shaybekov*, and *Abilkasim Jutakeev*, addressed the *Ürkün* theme in their poems. Additionally, in the *Kyrgyz academic tradition*, there are anonymous folk poems without a known author. In this book, *Tynystanov* uses *Kayran El* poem without a pen name.

«Айгыр, ат менен атан төө
Арык кылды кайран эл
Өлгөнүнүн терисин
Чарык кылды кайран эл
Жарты саат тынч алып
Жатпай жүрөт, кайран эл
Кытай журтун дүнүгө
Карык кылды, кайран эл

«Their horse and their big camel
Made the poor people weak
The skin of the deceased
He exploited the unfortunate people
Half an hour in peace
The poor people cannot endure
China's country with prosperity
Provided nourishment for the unfortunate people

¹⁴ O. Çobanoğlu, *Türk Halk Kültüründe Memoratlar ve Halk İnançları* [*Memorates and Folk Beliefs in Turkish Folk Culture*], Ankara, Akçağ, 2021, p. 30.

¹⁵ H. Aşlar, *Kırgız Halk Şiirinde 'Ürkün' Yansımaları* [*Reflections of 'Ürkün' in Kyrgyz Folk Poetry*], «MJSS», vol. 6, n. 4, 2017, p. 5.

Айгыр, атка эки сеер	The horse, the stallion for two pennies
Шарык кылды кайран эл	Gave it away for a negligible price to the unfortunate people.
Түрдүү-түрдүү көчөттүү	Various embroidered
Шырдак сатты кайран эл»	The poor people bought his felt rug» ¹⁶ .

The text titled «Малдардын Талашы» [*Maldardyn Talashy – The Quarrel of Animals*] features the *camel, horse, cow, sheep, and goat* talking. The work is written in the *fable* genre. The animals engage in a discussion among themselves, debating which one is more beneficial to humans. Eventually, an *owner* intervenes, stating that each of them is valuable to humans because of the benefits they provide, emphasizing love for animals and their significance.

Following this text, there are poems titled «Ойсул Ата» [*Oysul Ata – Camel*], «Камбар Ата» [*Kambar Ata – Horse*], «Зенги Баба» [*Zengi Baba – Cow*], «Чолпон Ата» [*Cholpon Ata – Sheep*], and «Чычан Ата» [*Chychan Ata – Goat*].

In Tynystanov's work, the ancestors *Kambar Ata* is the protector of horses in ancient Turkic mythology, *Oysul Ata* is the guardian of camels, *Zengi Baba* is the protector of cattle, *Cholpon Ata* is the guardian of sheep, and *Chychan Ata* is the protector of goats¹⁷. In Tynystanov's texts, the concepts of *Kambar Ata*, *Oysul Ata*, *Zengi Baba*, *Cholpon Ata*, and *Chychan Ata* are used both in the context of ancestor worship and to describe or give a general name to these animals.

In ancient Turkic culture, it is believed that animals have protective spirits, known as *iyeler*.

These *iyeler* safeguard the animals, establishing their presence in the cosmic design. In the mythology of a nomadic tribe that herds animals, whether domestic or wild, the importance of these animals is significant, providing essential evidence for the existence of a cult of ancestral spirits protecting these creatures.

As these nomadic people transitioned to a settled lifestyle, the emphasis on the animal cult diminished, giving way to a focus on plant-based culture. However, the cult of *iyeler* protecting animals remained preserved in Turkic mythology¹⁸. It is believed that horses, synonymous with Turks, along with sheep, cows, bulls, goats, camels, and deer, each have a guardian spirit. These *iyeler* establish the prosperity of these animals while regulating the relationship between them and humans. Ancient Turks showed respect to these *iyeler*,

¹⁶ K. Tynystanov, *Okuu kitebi*, Tashkent, 1924, p. 31.

¹⁷ M. Dyikanbayeva, *Kırgız atalar kültü ve Kırgız atalar kültünün yaşayan kültüre etkileri* [*Kyrgyz Ancestor Culture and Its Effects on Contemporary Culture*], unpublished doctoral dissertation, Ankara, 2009, p. 135.

¹⁸ F. Bayat, *Türk mitolojik sistemi 2* [*Turkish Mythological System 2*], Istanbul, Ötügen, 2012, p. 81.

offering sacrifices during specific periods guided by their ecological balance-based folk calendar to enhance the prosperity associated with animal husbandry¹⁹.

In Kyrgyz culture, *Cholpon Ata*, known as the guardian of sheep, is primarily recognized as the name of a saint originating from the *Yesevi* Sufi order, according to most sources. This name appears in various forms in other Turkic cultures, such as *Choban Ata* or *Choban Dede*. Among the people, there are various folk narratives about *Cholpon Ata*, and these stories generally include information about him herding sheep²⁰.

Choban Ata is associated with the civilizing hero function of being the one who first domesticated animals on the steppe and became the first shepherd. However, after the acceptance of *Islam* in Central Asia, the Turkic people, through the *Yesevi* Sufi order, transferred the civilizing hero function of *Choban Ata* to *Zengi Baba*, a *Yesevi* dervish renowned for his wisdom in the region.

Zengi Baba, known for his miracles in hagiographies, is depicted in mythological tales as the shepherd who domesticates animals and grazes flocks. The cult of *Choban Ata*, the protective ancestor of all shepherds and the guardian of animal herds, became popular among nomadic Turks who raised animals for a long time. Over time, even as his function was shared among other historical and legendary figures, *Choban Ata* has managed to preserve his role as the protector of animal husbandry²¹.

In Kyrgyz culture, *Oysul Ata*, recognized as the guardian of camels, is believed to be associated with the name of *Üveys (Veysel) Karani*, an *Islamic* saint²². Similarly, among the Turkmen people, it is accepted that *Veyis Baba* is the guardian, owner, and protector of camels. According to information in the *Turkmen Soviet Encyclopedia*, *Veyis Baba* is a mythical figure or character considered the spiritual leader of camels among *Central Asian* peoples (Turkmen, Kazakh, Kyrgyz). Belief in *Veyis Baba* predates the spread of *Islam* in the region.

According to widespread folk narratives, *Veyis Baba* is believed to be the first person to practice camel husbandry, possessing profound knowledge and expertise as a shepherd. Communities engaged in camel breeding call upon

¹⁹ M.S. Chelepi, *Türk tasavvufunda hayvan ruhu ve koruyucu pirlar sembolizmi* [*Animal Spirits and Protective Saints Symbolism in Turkish Sufism*], IV. Uluslararası Alevilik ve Bektaşılık Sempozyumu Bildiriler Kitabı (Proceedings of the IV International Alevi-Bektashi Symposium) (October, 8-20), Ankara, 2018, p. 267.

²⁰ M. Orozobaev, *Kırgızcadaki İslam dışı geleneksel inanç ve inanışlarla ilgili söz varlığı* [*Vocabulary Related to Non-Islamic Traditional Beliefs and Practices in Kyrgyz*], unpublished doctoral dissertation, Ankara, 2010, p. 67.

²¹ Bayat, *Türk mitolojik sistemi 2*, cit., pp. 83-85.

²² M. Orozobaev, *Kırgızcadaki İslam dışı geleneksel inanç ve inanışlarla ilgili söz varlığı* [*Vocabulary Related to Non-Islamic Traditional Beliefs and Practices in Kyrgyz*], unpublished doctoral dissertation, Ankara, 2010, p. 67.

Veyis Baba for help when their camels fall ill, and they make material offerings in gratitude to him, as conveyed by *Gökçimen*²³.

One of the well-known guardian spirits in Turkish mythology is *Tanrıoğlu Baba Kambar* or *Kambar Ata*. *Baba Kambar* undertakes the task of protecting and herding horses among the Turkmen, Uzbek, Kazakh, Kyrgyz, Tatar, and Nogai Turks. He is fond of entertainment as well, and after the advent of Islam, he became associated with the motif of *Kambar*, the devoted servant and assistant of Hz. Ali, responsible for caring for his horses. The volunteer servant responsible for Hz. Ali's horses is also named *Kamber*²⁴. In Kyrgyz culture, *Kambar Ata* is also recognized as the master of horses. *Kambar Ata* is described by Tynystanov with the following verses:

However, in the Sayakbay Karalayev variant of the *Manas* epic, *Kambar Ata* is portrayed as follows:

«Камбар Ата – кара айгыр,
Көп жылкыдан кары айгыр
Камбар алып бай жакып,
Мойнуна кысе салынып
Жаратканга Жалынып
Камбар ата – айгырды,
Ал туякка чалды эми
Айгырды Жакып союду эми»

«Kambar Ata – black stallion,
An old stallion from many herds.
Taking Kambar, rich Jakyp.
With the reins around its neck
Praying to the Creator
Kambar Ata, the stallion,
He hammered in his horseshoes now.
Now, Jakyp has slaughtered the stallion»²⁵.

In Chinghiz Aitmatov's story *Meeting with the Son Chordon Kambar Ata*, rushing to catch up with his son, prays: «May Allah grant that I reach on time! Come on, help me catch up! There's so much I need to tell my son!».

He thinks, without loosening his grip on his teeth, reciting the prayer of the rider galloping at full speed: «Oh, spirit of the ancestors! Kamber Ata, the guardian of the horses! Assist me! Let my horse not stumble! Grant him the wings of a falcon! Give him a heart of iron and legs like a gazelle! Bestow upon him the liver of fish!»²⁶.

The origin of another legendary figure, *Zeñgi Baba*, is claimed to be associated with the name of a saint named *Zaňgi Baba* who lived in the 13th century. According to Islamic sources, this man, known by the *epithets* *Zaňgi Ata* or *Zaňgi Baba* due to his black color, is said to be the grandson of *Arslan Baba*,

²³ A. Gökchimen, *Türkmen kültüründe deve ve develerin piri Veyis Baba* [The Camel and the Camel's Patron Veyis Baba in Turkmen Culture], «Türk Kültürü Ve Hacı Bektaş Velî Araştırma Dergisi», vol. 80, 2016, p. 226. Available at: <<https://dergipark.org.tr/tr/pub/tkchbva/issue/71954/1157610>> (last access: 27.07.2024).

²⁴ F. Bayat, *Kadim Türklerin mitolojik hikâyeleri* [Mythological Stories of the Ancient Turks], Istanbul, Ötüken, 2017, p. 190.

²⁵ S. Karalayev, *Manas destanı Sayakbay Karaliyevdin variantı boyunca* [The Epic of Manas According to the Sayakbay Karaliyev Version], Bishkek, Turar, 2010, p. 93.

²⁶ C. Aytmatov, *Oğulla buluşma* [Meeting with the Son], Istanbul, Ötüken, 2010, p. 48.

the first mentor of *Hoca Ahmet Yesevi* from Turkistan. It is mentioned that he earned his living by herding cattle²⁷.

The first documented example of *Bekbekey* is also found in the work. In Kyrgyz folk poetry, *Bekbekey*, which is sung with a melody under the title «Эмек Ирлары» [*Emek Irlary*] that encompasses agricultural and livestock activities, is typically performed during summer evenings while herding animals or guarding the livestock pen.

Bekbekey is a song primarily sung by young girls while herding animals or overseeing the pen, with the aim of protecting them from thieves, wolves, or various calamities²⁸. The *Bekbekey* song is usually performed by bridesmaids or girls and, occasionally, by boys who are waiting for flocks of sheep. During mountain nights, in the warm summer months when the weather is pleasant, or in the cool spring and autumn months, these songs are sung with the accompaniment of the *kobuz* for the shepherds waiting with their flocks in the pens²⁹.

In Kyrgyz folklore, there are various examples of *Bekbekey*. Some modern poets also have poems titled *Bekbekey*. In Kyrgyz folklore, *Emek Irları Bekbekey* is divided into three main classes: *Bekbekey*, *Shyryldang*, and *Op Mayda*. Etymologically, according to some scholars, *Bekbekey* is the name given in the form of «bek» «bek» «ey» to protectors considered sacred by ancient migrant peoples. However, some scholars indicate that the words «bek, bek, ey» have evolved from exclamatory verbs to nouns³⁰.

Folklorist S. Zakirov expresses the following idea: in the past, attendants who stood around the stable to protect the animals, calling out to each other. Girls who looked after the animals expressed their feelings with the words «бек бол» [*bek bol* – be well], «сак бол» [*sak bol* – be careful] in the rhythm of the song as «bek.. bek...ey., sak...sak...ay». The words later sung separately merged, giving rise to the song *Bekbekey*³¹. An example of *Bekbekey* in Tynystanov's work is as follows:

«Мине турган атынга
Жал болоюн бекбекей!
Иче турган ашынга,

«To the horse you will ride
May its mane be like silk!
To the food you will eat,

²⁷ M. Orozobaev, *Kırgızcadaki İslam dışı geleneksel inanç ve inanışlarla ilgili söz varlığı* [Vocabulary related to non-Islamic traditional beliefs and superstitions in Kyrgyz], unpublished doctoral dissertation, Ankara, 2010, p. 67.

²⁸ C. Tashtemirov, S. Bayhodcoyev, S. Zakirov, *Kırgız elinin oozeki çığarmaçılık tarıhının oçerki* [An Outline of the Oral Literary History of the Kyrgyz People], Frunze, İlim Basması, 1973, p. 24.

²⁹ N. Yıldız, *Kırgız Türklerinde iş türküleri* [Work Songs of the Kyrgyz Turks], «Millî Folklor», vol. 18, n. 70, 2006, p. 70. Available at: <<https://www.millifolklor.com/PdfViewer.aspx?Sayi=70&Sayfa=61>> (last access: 27.07.2024).

³⁰ U. A. Asanov, *Uluttuk ensiklopediya* [National Encyclopedia], Bishkek, Kyrgyzstan Yay, 2015, Vol. 2, p. 808.

³¹ T. Tanayev, *Kırgız folklorundagı lirikalık janrlar, I. Kitep* [Lyrical Genres in Kyrgyz Folklore, Vol. 1], Osh, ÖMU, 1998, p. 18.

Бал болоюн бекбекей!	May it be sweet like honey!
Түндө түндөп Жүгүргөн Түлкүнүн колу сөгүлсүн, Түнкү үйкүнү төрт бөлгөн, Карышкыр каны төгүлсүн.	Running in the night, May the fox's leg break, Interrupting the night's sleep in the middle, May the wolf's blood be spilled.
Бекбекей качты, бел ашты... эй...	Bekbekey ran away, crossed the mountain pass, hey...
Саксакай кууб адашты... эй...	Saksakay lost his way while chasing, hey.
Бекбекей, бек кайтар!... эй...	Bekbekey, keep a good watch! Hey...
Саксакай, сак кайтар!... эй...»	Saksakay, guard and protect! Hey...» ³² .

In Tynystanov's work, there is a text titled «Чагылган» [*Chagylgan – Lightning*]. This text features elements specific to ancient *Turkic* beliefs about lightning. In the narrative, lightning strikes a house in the village, resulting in the death of a woman and animals. Tynystanov critically examines the prevalent belief in lightning nails among the people with a modern perspective. According to Tynystanov, lightning does not strike in the shape of a nail, and the hero in the text eventually abandons this belief. Tynystanov argues that an illiterate population can make various claims and attribute natural events to wrong and ancient beliefs. He emphasizes the fallacy of such beliefs. However, Tynystanov does not provide a scientific explanation for the occurrence of lightning in the text; he simply states that lightning does not fall like a nail.

The ancient Turks used the expression «Tanrı yaşın yavaşattı» meaning «God struck with lightning or thunder»³³. Among the ancient Turks, there was a belief and ceremony related to the lightning nail and raising it to the sky. In Central Asian communities, when lightning strikes the ground, its nail is believed to be driven into that location. While considering the place where lightning struck sacred, the Turks avoid getting too close to it and keep their animals away. According to the Kyrgyz people, the feathers of an animal grazing in a place struck by lightning immediately fall out, leaving it completely bare. This is because when lightning strikes a place, its nail remains stuck there. The ancestors of the Uyghurs also gather at the site where lightning struck, perform rituals, sacrifice animals, and bury them in the same place after the ceremonies. After some time, they gather at the same location again. Female and male shamans recite prayers, and warriors ride their horses, circling around the pit or the tree burnt by lightning³⁴.

The perceptions of lightning and thunder in ancient Turkic beliefs are quite

³² K. Tynystanov, *Algachky emgekter [Initial Works]*, Bishkek, 2001, p. 184.

³³ M. Kashgarly, *Divanü Lûgat-it-Türk [Besim Atalay]*, 5th ed., Ankara, TDK Yayınları, 2006, Vol. 4.

³⁴ B. Ögel, *Türk mitolojisi [Turkish Mythology]*, Ankara, Turkish Historical Society, 2002, p. 284.

complex. Uyghurs interpret lightning and thunder as a message from God. They shoot arrows into the sky and shout while lightning falls, and they welcome lightning by banging metals together to create noise³⁵. According to some beliefs, there is a deity associated with lightning. This deity follows evil spirits on the ground, sends its fire to the trees where they hide, and thus causes lightning to strike. *Burkut Ata*, recognized as a common deity in the Turkic world responsible for bringing rain, also performs the task of causing lightning among the Tatars and Turkmens³⁶.

In the journey from Central Asia to Anatolia, the phenomenon of lightning, as well as the sun, moon, and rainbow, has not been well-received despite positive beliefs³⁷. According to *Reşidüddin*, in the 13th-14th centuries, there were two tribes, one afraid of lightning and the other not. The *Uryankat* tribe claimed to be associated with those who blew the bellows in *Ergenekon*. Their traditions involve shouting at the sky, lightning, and thunder when they occur frequently, and speaking ill words. According to the Mongols, lightning is similar to a dragon. When it strikes and falls somewhere, they sit in their tents in fear and do not go outside³⁸.

2. Оқуу-Жазуу Бил [*Okuu-Cazuu Bil – Learn to Read and Write*]

The work was published in Moscow in 1927. During that period, the state aimed for the widespread literacy of the population, and Tynystanov wrote his work in line with this goal. The first part of the work aims to teach reading and writing; therefore, the letters of the Arabic alphabet are introduced, and words are divided into syllables. There are few folkloric texts in this work, and besides grammar and literacy texts, there are also texts related to the state structure of that period.

In this work, there is a text titled *Ürkün*, which provides information about the 1916 *Ürkün* uprising and the tragic events that occurred to the Kyrgyz people after the uprising. Following this text, there is the poem *Kayran El*, which Tynystanov had used in his previous textbook. In the folk tale titled «Дурусдук

³⁵ A. Inan, *Eski Türk Dini Tarihi [History of Ancient Turkish Religion]*, Istanbul, 1976, p. 30.

³⁶ A. Gökçimen, *Türkmenistan'da Bir Yağmur İyesi, Burkut Ata [A Rain Spirit in Turkmenistan]*, «Bilig», vol. 52, 2010, p. 70.

³⁷ F. A. Turan, *Orta Asya'dan Anadolu'ya Mitik Yolculukta Tabiat Olayları [Natural Events During the Mystical Journey from Central Asia to Anatolia]*, «Milli Folklor», vol. 12, n. 96, 2011, p. 57.

³⁸ B.S. Sayılır, *Eski Türk İnanış ve Mitolojilerine Göre "Ses" in Türkler Üzerindeki Etki ve Yansıması [The Effect and Reflection of 'Sound' on Turks According to Old Turkish Beliefs and Mythologies]*, «Ulakbilge Journal of Social Sciences», vol. 68, 2022, p. 3.

Менен Буруштук» [*Durushtuk menen Burushtuk*], there are two wealthy men, one honest and the other deceitful. The honest one is named *Durusbay*, and the deceitful one is named *Burushbay*, as given by the people. *Burushbay* is much wealthier than *Durusbay*. One day, *Burushbay* asks *Durusbay*:

Burushbay, isn't it better to get rich with deceit in the world?

-No, it's not better!

-Look at my wealth. It's almost ten times the money earned with honesty. Let's ask people which one is better. If you win, I will give you all my wealth, but if I win, you will give me all your wealth³⁹.

Durusbay refuses this proposal. He doesn't want to enter into a pointless bet and risk losing the money earned honestly. Because if they ask the people, they might say that *Burushbay* is right. Therefore, *Durusbay* makes another proposal: when it becomes clear over time who was wrong, the losing party will go to the other and confess their mistake. The two men agree on this matter. Years pass, and both of them grow old. One day, *Burushbay* visits *Durusbay*, inquiring about his well-being and whether he has increased his wealth. *Durusbay* says that he hasn't increased his wealth and has no worries. He explains that, being old, his sons are now taking care of his affairs. They treat him very well and respectfully, promising to uphold the image of a good person that he inherited, and he has no concerns. *Burushbay*, on the other hand, complains that he hasn't received any good from his sons and that they have squandered his wealth recklessly.

Although he claims to work honestly, he complains, saying, «Were you honest yourself?». *Burushbay* confesses to *Durusbay* with tears in his eyes that honesty is the most sacred thing in the world.

3. Биздин Тил [*Bizdin Til – Our Language*]

The work is primarily written for the instruction of grammar and language peculiarities. The book includes rules for writing letters, information about the October Revolution, excerpts from various Kyrgyz epics, some poems from Tynystanov's collection of poems called «Касым Ирларынын Жынагы» [*Collected Works of November Poems*], and various information related to military service. While Tynystanov notes the sources of some texts, he does not specify the sources of others. It is highly likely that the author himself wrote these texts. Excerpts from the epics «Janyl Myrza» and «Semetey» are used for the instruction and practice of certain grammar additions in the work.

³⁹ Bektenov, Erkebayev, *Kasım Tınıstan uulu. adabiy ıııarmalar*, cit., p. 107.

4. Жаны Айыл [*Jany aiyl* – *New Village*]

The work is written in Latin script and is intended for elementary school students, containing numerous pedagogical texts. In the text, there is a narrative related to the legend of «Baba Dyikan», who is considered the master, ancestor, and protector of farmers in Turkish mythology. Baba Dyikan is known by different names among various Turkic groups, such as *Bobo Dehkon* in Uzbeks, *Baba Dyihan* in Turkmens, *Dikan Baba* or *Dikan Ata* in Kazakhs, *Diyhan Baba* in Karakalpaks, and *Baba Dyikan* in Kyrgyz⁴⁰.

According to the legend, it is believed that Baba Dyikan appears in the form of a gray pigeon. If Baba Dyikan walks among the crops, the harvest will be abundant. Kyrgyz people expect abundance and prosperity in the harvest from Baba Dyikan. When they harvest the first crop, they pile it up in the shape of a peak, sacrifice a sheep on top of the pile, and sprinkle the blood as an offering. Then, they wait for the arrival of Baba Dyikan. They believe that Baba Dyikan, after waiting throughout the night, will fly in and land on the pile, bringing blessings.

Based on an alternative perspective, Baba Dyikan is considered the first person to sow wheat in the soil. The song he sings while working is called «Оп Майда» [*Op Mayda*]. In Kyrgyz, «Mayda» [*mayda*] means «small, thin, few, tender, young». These communities that sow wheat with a plow place a large tree trunk in the middle of the threshing floor and tie their oxen or cows to it in turn. During plowing, the tied rope winds around the tree trunk. The ancient Turks called this tree trunk «op». Therefore, during the threshing time, if an animal goes outside the designated area, it is driven toward the «op» side⁴¹. In another expression, «op» is considered a shout, a command, or a scream to empower the animal plowing the field⁴². In *Dîvânü Lugâti't-Türk*, «op» is explained as the «ox in the middle of the oxen that run to thresh»⁴³.

Baba Dyikan appears very rarely to some people in the guise of an old man with white beard. This legendary element, especially encountered in folkloric materials such as tales and epics, as well as in applause and prayers, is also present in the Manas epic. In the epic, Manas encounters his father Jakyp Baba Dyikan. In the variant of Manaschy Bagysh Sazanov, the event is narrated as follows: The Turkish tribes, who suffered a major attack by the Chinese, lose

⁴⁰ A. Karypkulov, *Manas ensiklopediya I* [*Manas Encyclopedia I*], Bishkek, Kırgız ensiklopediyasının başkî redaksiyası 'Muras' ilimiy-progapagandık işker dolbooru, 1995, p. 121.

⁴¹ C. Tashtemirov, S. Bayhodcoyev, S. Zakirov, *Kırgız elinin oozeki çıgarmaçılık tarîhinin oçerki* [*An Overview of the Oral Literary History of the Kyrgyz People*], Frunze, İlim Basması, 1973, p. 30.

⁴² A. A. Akmataliyev, *Kırgız adabiyatının tarîhi* [*History of Kyrgyz Literature*], Bishkek, Kut-Ber, 2017, p. 125.

⁴³ Kashgarly, *Divanü Lûgat-it-Türk*, cit., p. 439.

the battle and are expelled from the Central Asian region where they lived. Exiled to various regions as separate tribes, the Kyrghyz are moved away from the Tian Shan mountains and settle in the Altai mountains. Here, having lost his parents at an early age and facing hardships in poverty, Jakyp seeks refuge under the protection of his older brother Bay. One day, a white-bearded, turbaned old man, riding a packless ox, crosses paths with Jakyp in the area of Aykol and suggests planting wheat there. Taking the old man's advice to heart, Jakyp requests a bag of wheat from his brother Bay and plants it where the white-bearded man had advised. That year, crops in other regions suffered significant damage from locusts, but Jakyp's crops, with the grace of Baba Dyikan, remain unaffected and yield abundantly. From that day on, Jakyp sells his harvest, improving his situation and becoming wealthy⁴⁴.

As Bayat⁴⁵ states Baba Dyikan is a sturdy old man who serves as the patron of farmers, being the one to plant the first seeds and open the first irrigation channels. However, despite being the patron of farmers, Baba Dyikan couldn't make the irrigation canal on his own; he learned this from the Devil. At this point, the interaction between legend and folktale comes into play.

In the story written by Tynystanov, events unfold between Baba Dyikan and the farmers. Even though the harvest is abundant that year, the farmers are not satisfied, so they call Baba Dyikan to increase the yield. A farmer wants to sacrifice his goat to summon Baba Dyikan, but his wife opposes this idea, leading to an argument. The dilemma is that if the sacrifice is not made, significant wealth will be lost. The future wealth cannot be compared to the goat. The farmer decides to sacrifice the goat, pleads with Baba Dyikan, completes the necessary ritual, returns home, sets up a feast, and invites all the neighbors. Some of the neighbors approve of the farmer's sacrifice and pleas to Baba Dyikan. After the meal, the guests disperse. The farmer's wife suggests returning to the field to prevent the livestock from entering and eating the crops of returning people from the high pasture. However, the farmer opposes his wife's idea.

While the farmer sleeps at home, he dreams of Baba Dyikan. In the dream, Baba Dyikan comes to the field and relieves himself; suddenly, the crops multiply, and the harvest increases. The farmer cannot contain his abundance of crops in the containers. Interestingly, the Baba Dyikan the farmer sees in his dream is actually comprised of many horses and foals. These horses and foals come to the field at night, devour all the wheat, but instead of the crops multiplying and the harvest increasing, the field is left with nothing but horse dung. The farmer's wife wakes up early in the morning, goes to the field, sees the devastating scene, and cries. There is nothing left in the place of the wheat but blowing winds. The farmer, still asleep at home, wakes up in confusion

⁴⁴ Karypkulov, *Manas ensiklopediya I*, cit., p. 121.

⁴⁵ Bayat, *Kadim Türklerin mitolojik hikâyeleri*, cit., p. 195.

and asks, «What happened, what happened?». The woman, holding a cow dung fork, responds, «Baba Dyikan, Baba Dyikan». The text concludes in this manner.

5. Тил Сабагы [*Til Sabagy – Language lesson*]

In this book, written in Latin script in the year 1932, alphabet, grammar, suffixes, and spelling rules are taught. In the preface of the book, Tynystanov mentions that the book is written according to the Kyrgyz language program and emphasizes that the goal of the book is not only to teach reading and writing but also to contribute to children learning their mother tongue quickly and accurately. Additionally, it is stated that the book will help children develop various skills. The work includes folkloric verses, songs, and riddles inserted into the dialogues of students. In this work, Tynystanov also provides detailed information about birds. In his poem titled «Ак Бугудай» [*Ak Buudai – White Wheat*], he almost pleads with wheat, wishing for it to grow with high yield.

«Ак буудай	«White wheat,
Ак буудайм,	I am white wheat,
Толук даның,	With full ears,
Башынды ие көр!	Bow your head!
Ушу Жаздын	This spring
Маани-Жайын	Appreciate it!
Жакшы биле көр!	Know its value well!
Капыталдын	Into the black soil's
Жүрүгүнүө	Into your heart
Октой тие көр!	Enter like a bullet!
Октой, октой, октой!	Like a bullet, like a bullet, like a bullet!
Октой тие көр!»	Enter like a bullet!» ⁴⁶

Conclusion

Kasym Tynystanov, who made significant contributions to the development of the Kyrgyz language and culture, was executed by the Soviet regime in 1938 at the age of only thirty-seven. In his textbooks and other literary-cultural works, Tynystanov extensively utilized folkloric sources and oral traditions. There are two main reasons for Tynystanov's preference in this regard. Firstly, during that period, there were no written Kyrgyz texts readily available for

⁴⁶ K. Tynystanov, *Algaçkı emgekter* [*Sensor efforts*], Bishkek, 2001, p. 220.

students in schools and the wider population to read. Secondly, Tynystanov aimed to introduce folkloric works to the general public and evoke national consciousness among the people.

While some of the non-folkloric texts in these works are about the Soviet state and ideology, Tynystanov's character is closer to the *Jadidism* ideas, which include national motifs, rather than the Soviet ideology in terms of temperament and worldview. His initial education in a village school, followed by his involvement in the *Alash Orda* movement during his time at the Kazakh Education Institute, and the influence of *Magzhan Zhumabayev*, further intensified Kasym Tynystanov's national sentiments.

Despite this, Kasym Tynystanov believed that folkloric products should be frequently used in the upbringing of Kyrgyz youth, emphasizing fundamental moral, humane values, and national consciousness. According to him, *folklore* and *mythology* constitute the most valuable cultural treasure of a nation, and this treasure must be utilized in the education of the new generation. The identification and analysis of the folkloric products in Tynystanov's works hold importance for both Kyrgyz folklore and global folklore studies.

The Construction of Teacher-Student Relationships in Song Dynasty Academies under the Imperial Examination System*

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ABSTRACT: In the Song Dynasty, the academy flourished under the improvement of the imperial examination system, the decline of the official school and the impetus of the Neo-Confucianists, the development of various educational activities was more mature, the educational function was complete, the rules and regulations are sound, and the construction of teacher-student relationship in the institutional aspect has already been shaped. Based on this, the construction of the teacher-student relationship in the academy relies on the appointment of teachers, the strict selection of students, the innate advantages of natural space, the norms of the rules and regulations and the freedom of lecturing activities, and ultimately began with a firm two-way choice, refined in the high-quality consultation and refinement, and lasted in the solid emotional snuggling. In the overall construction process, the fundamental traits of being «both teacher and friend, long-lasting and stable» were gradually cultivated, not only to promote the dissemination and development of the Neo-Confucian, but also to a certain extent to purify the social atmosphere at that time.

EET/TEE KEYWORDS: Academy; Teacher-student relationship; Imperial examination; Neo-Confucian; Tutorial system.

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The academies hold a significant position in the history of Chinese education, playing a critical role in children's development and students' learning. The academy sprouted in the Tang Dynasty, was completed in the Song Dynasty, continued to develop in the Yuan Dynasty, Ming Dynasty, and was abolished in the Qing Dynasty, and continued to develop with twists and turns. Mao Zedong pointed out in the *Declaration on the Establishment of Hunan University of Self-Study* 湖南自修大学创立宣言 in 1923 that «the academy and the school each have their reputable features» and the merits of the academy are that «teachers and students are very close to each other», «there are no professors to manage the academy, but it is a place for spiritual exchange and free research», and «the curriculum is simple and the seminars are strict, so that one can have a pleasant and relaxing time»¹. The strengths of the academy are summarized in three aspects: teacher-student relationship, teaching and curriculum. Among them, the harmonious teacher-student relationship, which is based on the principle of «making friends with the Tao», «sharing the same aspiration», «helping each other with love», and «teaching benefits teachers as well as students», is the key reason to promote the development of the academy.

Since the 1920s and 1930s, many scholars have conducted multi-level and multi-faceted research on the academy and achieved fruitful research results. Among them, the discussion on the teacher-student relationship in traditional academies mainly focuses on two aspects. On the one hand, some scholars focus on summarizing the reasons for the formation of good teacher-student relationships in academics. From the perspective of education management, Fei Zhenxin analyzed the purpose of running the academy, the criteria for selecting master teachers, the way of learning guidance and the academic management mode². Huang Manyuan started with the rules of selecting teachers and students and the rules of admitting students, exploring the teacher-student relationship, «for what reason it was established, and how it developed»³. On the other hand, some scholars focus on the value of a good teacher-student relationship in the academy. «The harmonious teacher-student relationship greatly facilitated the inheritance of the academic lineage at that time through the cooperation of teachers and students in writing and researching, the establishment of the academy by the disciples to teach their students, and the worship of the ancestors»⁴.

¹ Hunan Student Union *et alii*, *Xiangjiang Review, New Hunan, New Era*, Changsha, Hunan Normal University Press, 2009, p. 239.

² Z.X. Fei, *The foundation of good teacher-student relationship in ancient academies and its contemporary revelation*, «Journal of Inner Mongolia Normal University (Education Science Edition)», n. 7, 2013, pp. 26-29.

³ M.Y. Huang, *On the construction, features and value of teacher-student relationship in Chinese traditional academies*, «Social Science Front», n. 1, 2022, pp. 236-243.

⁴ J.X. Li, *Teacher-student relationships in China's academies (Shuyuan) in the Song Dynasty (960-1279)*, «Modern University Education», n. 3, 2019, pp. 70-75.

In general, the existing research results on the teacher-student relationship in the Song Dynasty academies are relatively few, and most of them analyze the causes of the construction of good teacher-student relationships in the academies, the basic form and its characteristics from a macro point of view, which is relatively static. And the historical materials of teacher-student interaction are still to be further excavated.

1. *Development of academies in the Song Dynasty*

«The Song Dynasty was a period of great educational development»⁵, and the academies ushered in a golden age of vigorous development, with the total number of academies «reaching 720 during the Song Dynasty, more than ten times the total number of academies in the Tang and the Five Dynasties»⁶. The four great academies are famous all over the world, although historians have not yet been able to form a consensus, such as Fan Chengda thinks that it is «Cu Lai, Jin Shan, Yue Lu and Shi Gu» 徂徠、金山、岳麓和石鼓, Lv Zuqian thinks that it is «Song yang, Yue lu, Sui yang and Bai lu dong» 嵩阳、岳麓、睢阳和白鹿洞, and Ma Ruilin thinks that it is «Bai lu dong, Shi Gu, Ying tian fu and Yue lu» 白鹿洞、石鼓、应天府和岳麓, but from the side also reflects the «hundred schools of thought» 百家争鸣 at that time. Specifically, first of all, all kinds of educational activities in the Song dynasty academy have developed more mature, the formation of research, lecturing, book collection, book engraving, sacrifices and school farms six major undertakings of the academy. Secondly, the academy system in the Song dynasty was basically established, such as the election and recruitment of the chief director 山长, teachers appointed and the admission of the management of the students. Academy formed a complete set of teachers and students management system, as well as the funding, daily teaching management, all have a rule to follow, laid a good institutional foundation for the construction of harmonious teacher-student relationships. Finally, in the «strict righteousness, heavy ethical» 严义利、重伦理 cultural atmosphere, the academy teachers and students have a common ideal pursuit, and really achieve «to the Dao of fellowship, like-minded» 以道相交, 志同道合, then another future generation of the academy to look forward to. The root of the development of the Song Dynasty academy could not

⁵ J.S. Yuan, C.S. Lin, *The ways, characteristics and contemporary response of prodigy education in the Song Dynasty*. «History of Education & Children's Literature», vol. XVIII, n. 2, 2023, pp. 103-124.

⁶ H.B. Deng, *History of Chinese academies*, Shanghai, Orient Publishing Center, 2004, p. 39.

be separated from the openness and fairness of the examination environment, the decline of the official school and the prosperity of Neo-Confucian.

1.1. *Open and fair examination environment*

In the Song Dynasty, the wars have just subsided, and the chaotic situation of constant regime change since the Five Dynasties has been completely changed. In order to learn from the experience of the former military generals who supported their armies and the recurrence of mutinies, Emperor Taizu of the Song Dynasty established the basic state policy of «valuing literary talent above martial arts» 重文轻武, on the one hand, taking away the military power and increasing the strength of the «suppression of the military officers»; on the other hand, emphasizing the use of civil officers, increasing the proportion of literati. The number and scope of the gentry 士大夫 were constantly expanding. According to statistics, the average annual number of students enrolled in the Song Dynasty was about five times that of the Tang Dynasty. However, the old official school system is in a state of basic paralysis. The central government can only barely maintain the Imperial Academy of Learning 国子监 and the National University 太学. In the face of the rapidly expanding demand for talent but nowhere to raise elites, at this time the academy naturally assumed the responsibility of «raising elites». Therefore, at the beginning of the Song Dynasty, the academy was to a certain extent forced to develop in order to fill the vacancies in official school education.

At the same time, the imperial examination system, as an important way of «selecting officials», also began to improve, further promoting the development of the academy. First of all, in the context of the exponential increase in the quota of enrolment students, the restriction of birth has been completely abolished, so the scholar, farmer, industrialist and businessman can be enlisted in the civil service, for the middle and lower classes of the society to provide the space for upward mobility. Secondly, the «Exam Paper system» 行卷制度和 the «recommendation system» have been abolished, and the «paste name, transcription system» 糊名、誊录制 has been strictly implemented. «Everything is based on exam paper for deciding whether to stay or go» 一切以程文为去留, the imperial examination has become more fair. Secondly, the increase in the Palace Examination which the student admission power transferred to the emperor, only based on merit, completely replaced the hereditary system of the clan. Finally, in the content of the examination, rote memorization subjects such as «Paste the Five Classics» 贴经 and «Moyi» 墨义 have been abolished. The examination was gradually shifted from poetry and fugue to essay on current affairs, focusing on the selection of «men of practical knowledge». This open and fair competitive environment greatly stimulated the scholar's enthu-

siasm for learning, and the academy happened to provide valuable educational resources, the apprentices «begged for the nine scriptures to study» 乞赐九经肄习。The improvement of the imperial examination system closely integrated school education with talent selection, and the academy, as an important educational institution in the Song Dynasty, naturally developed rapidly.

1.2. *Official school is riddled with shortcomings*

The limitations of the development of the scale of the academy make it impossible to completely replace the official school. The contradiction between the expansion of the number of scholarships in the imperial examination and the inadequacy of government education to meet the demand for education became increasingly prominent. As a result, it directly promoted the Northern Song Dynasty three «Set up Schools» movement. The status of the official school has been continuously upgraded, and the scale of school education has been expanded. «The edict of the districts, regions, commanderies are set up schools, set up officials to teach»⁷, under the sky there is no official school. Gradually, there was a certain difference between the academy and governmental education, that is, the academy no longer aimed at participating in the imperial examinations and training officials, but paid more attention to the cultivation of the student's moral character and the formation of critical thinking.

With the increasingly close links between the official school and the imperial examination, the drawbacks of official education in the cultivation of talents are also gradually highlighted. The learning atmosphere is impetuous, and the utilitarian tendency is obvious. Central and local official schools are «empty words with no meaning of the text and more than the intention of profit and wealth, teachers and the scholars of Confucian school all pursuit it» 文具胜而利禄之意多, 老师宿儒尽向之⁸. The school should have been in order to select a «person of practical learning». The examination candidate should be all for the sake of righteousness and not for the sake of profit 士之来者应皆为义而不为利. In the period of Renzong, «the students who studied at the Imperial College were of good moral character, and those who were called government students were all pleasing to the eye» 游太学者, 端为道艺, 称弟子者, 中心说而诚服之. But after the «Set up Schools» reform, official schools have often become a field of profit, «the person in charge of teaching takes its

⁷ (Song) M. Hong, *Rongzhai Suibi*容斋随笔 2, 3, 16 vols., Shanghai, Shanghai Bookstore Publishing House, 1984, p. 95.

⁸ (Ming) D.X. Wu *et alii*, *Yuelu Shuyuan Zhi*岳麓书院志, Changsha, Yuelu Press, 2012, p. 98.

good for the imperial examination article»掌教其事者, 不过取其善为科举之文, «those who aspire to righteousness and reasoning have nothing to seek in the official school, and go to the school one after another, but only for the quotas of Xie Zhuang and She Xuan»士之有志于义理者, 既无所求于学, 其奔趋辐辏而来者, 不过为解额之滥舍选之私而已⁹. Zhu Xi in the *Jing Jiangfu School Biographies*静江府学记 also mentioned that

The schools set up in the latter days, though not different from those of the former times, have forgotten their roots in the teaching of the teachers and in the learning of the pupils, and have turned away from righteousness to profit. No return to the intention of the late king. Therefore, although the name of the school is in, but in fact not raised. Customs are deteriorating, talent is declining.

后世学校之设, 虽或不异乎先王之时, 然其师之所以教, 弟子之所以学, 则皆忘本逐末, 怀利去义, 而无复先王之意。以故学校之名虽在, 而其实不举。其效至于风俗日敝, 人才日衰¹⁰。

It can be seen that the official school at this time is full of shortcomings and, to a certain extent, has existed in name only. The official school students only know that there is the imperial examination and do not know that there is learning, know that there is the sound of profit and do not know that there are virtues. The accumulated shortcomings of the official school pushed the academy on the road of independent development, and the development of the academy once again reached its peak was a revival movement that took the initiative to remove the old shortcomings.

1.3. Prosperity of Neo-Confucian

Academy education is also Confucian education to a certain extent. The Confucian heritage of the Song dynasties emphasized the interpretation and understanding of Confucian doctrine, and in the process of studying the ancient classics, the distinctive theories of Neo-Confucian were constructed. The theory advocates the «Way of the Sage», which should go beyond the pursuit of fame and fortune, «to enter into the ear, to be stored in the heart, to be embodied in virtue»入乎耳, 存乎心, 蕴之为德行, 行之事业. It emphasizes the individual's intrinsic moral self-consciousness, rather than the pursuit of the imperial examinations and career paths. «Those who only use words and rhetoric as a means to achieve the goal of success are ugly».

⁹ (Song) X. Zhu, *School Examination Private Discussion*学校贡举私议, in Id., *Zhu Zi Quan Shu (Revised)*, Shanghai, Shanghai Classics Publishing House, Hefei, Anhui Education Publishing House, 2010, Vol. 23, p. 3363.

¹⁰ (Song) X. Zhu, *Jing Jiang Fu Xue Ji*静江府学记, in Id., *Zhu Zi Quan Shu (Revised)*, cit., Vol. 24, pp. 3741-3742.

In the face of the failure of government education, the Neo-Confucianists at first tried to start from the government school system itself. They lectured and spread the ideas of Neo-Confucian in government schools at all levels, but the government schools have accumulated shortcomings for a long time. The scholar knows that there is the imperial examination and does not know that there is learning, see the benefits but not see the righteousness of the school. At the same time, the contents of the teaching are all the «secular book». From the content of the teaching, talent cultivation objectives, and so on, it is difficult to change, and its pursuit of the gentleman's way is very different. Therefore, the Neo-Confucianists had to seek a path outside the official school in order to get rid of the thick atmosphere of the pursuit of fame and fortune. They look for «leisure and open space» where they seek the Dao and learn together. So they were actively involved in the revival of the construction of the academy movement. Not only for the thousands of miles to seek teachers and friends of the «aspirants» to provide a place suitable for cultivation and learning, but also to meet the Neo-Confucianists' educational ideals.

Zhu Xi, Lv Zuqian, Zhang Shi and other Neo-Confucianists carry out their governance of the world in the practice of education. On the one hand, integrate Neo-Confucianism thought into education and teaching practice, to help students to refine their character and set a lofty ambition. On the other hand, taking the academy as the position promoted the spread of Neo-Confucianism ideas. The close combination of Neo-Confucianism and academies was also deepened in this process, which directly promoted the prosperity and development of academies in the Song Dynasty.

2. The Construction of Teacher-Student Relationships in the Song Dynasty Academies

The essence of a relationship is the process of establishing intersection and connection, so the formation of a good teacher-student relationship should be considered from the perspective of a dynamic process. The generation of teacher-student relationships in academies stems from the increasing strengthening of its teaching function, which fundamentally lies in the interaction between teachers and students. On the basis of mutual understanding of each other's choices, teachers and students form a strong emotional connection through the interaction in teaching and life.

2.1. *Two-way choice between teachers and students*

2.1.1. *Selection and recruitment of teachers for the Academy*

From the time when Confucius traveled around the world lecturing, the «Example-Following» cultural tradition has been formed, with students and teachers drinking and sleeping together, implicitly accepting the cultivation of the teacher's personality and morals. *The Book of Rites·Studies* 礼记·学记 also mentions «choosing a teacher can not be careful», reflecting the importance of choosing a teacher. Zhu Xi in the Nankang military tenure, for the revival of the Bai ludong Academy formulated a series of measures, «hiring teachers, enrollment» which is an important one. Teachers have the importance of connecting between the beginning and the end.

In contrast to the official schools of the Song Dynasty, there were a series of positions in the school, each with clear responsibilities. The main ones responsible for teaching affairs were the doctor, the director of studies, the sub-registrar and the instructor 博士、学正、学录、学谕. Their selection and recruitment were mainly made by officials directly appointed by the government. The Bai Ludong Academy practiced the system of responsibility of the dean (the chief director of the cave). The management of cave affairs is centered on the chief director. Chief secretary «draw up the discipline of the common affairs and exemplify the students and disciples» 纪纲庶事, 表率生徒. The vice lecturer assisted the master of the chief director in the management of the teaching and learning work. In addition, there are also teaching management positions such as Dongzheng, Jiangshu, Tangshu, Zhixue and instructor 洞正、讲书、堂书、直学、学谕. In general, the teaching of Bai Lu Dong Academy is based on the dean, as well as other hired or invited vice lecturers. The dean plays an exemplary role in the academy. Therefore, the selection and hiring criteria of the teachers in the academy are the most stringent, especially for the chief director.

About the dean's selection and recruitment, the character is obviously put in the first place, «must be careful to seek people of good character and knowledge»¹¹. «Those who know the Five Classics and are committed to love and friendship» are qualified to be a dean. In terms of qualifications, «if people knowledge of the scriptures and moral integrity, although the civilian can be; if people are not knowing the scriptures and not being of good character, although juren, jinshi can not also». Zhu Xi believes that even if the academy can not «build lots of houses», owning high-quality teachers will be able that «on the announcement of the reconstruction of the humanities of the dynasty's main purpose, under the continuation of the sages of the wind in the party to come» 上以宣布本朝重建人文之大旨, 下以续先贤之风声于方来

¹¹ H.B. Deng, *Statutes of the Xiangshan Academy* 象山书院章程, in *The Collection of Chinese Academy Rules*, Shanghai, Zhongxi Company, 2011, Vol. 2, p. 695.

¹². After the departure of Zhu Xi, the Jiangxi judicial commissioner江西提刑 hired scholar Zhou Si as dean, «who had a quiet personality, was liberal and good at antiquity, with a name for poetry», «set Zhu Zi words record, in order to introduce the later school» 性沈静, 博雅好古, 有诗名, 集朱子语录, 以绍后学. Jia Ding ten years, Zhu Xi's son to undertake his ambition. During his tenure as the dean, the scale of the academy was so large and magnificent that it was «superior to the academies in other district schools». After that, Zhu Xi's disciples Zhang Qia and Tang Jin «two gentlemen from Hui An's theory of deep force for a long time». «Many scholars came to gather in the wind, and used their spare time to repair the hall, straighten up the wings, and widen the scope of the old days» 多士闻风来集, 又以暇日大葺堂宇, 整整翼翼, 增广于旧日. Another scholar Guo Yuanren, known as «Mr. Liuzhou», once served as the Bai Ludong Academy lecturer with «excellence in learning and behavior and teaching in a structured manner» 学行兼优, 教学有法. Zhu Xi's disciple Chen Wenwei in the face of Bai Ludong Academy's teacher strength, once exclaimed «I know that the sword is still in the Bai Ludong Academy, teacher scale is more and more broad that is how the chakra stays alive, how fortunate they are» 窃知琴剑尚处白鹿, 非特老师规模愈增弘广, 而此气脉赖以不绝, 何其幸也¹³.

Throughout the Song Dynasty Bai Ludong Academy successive chief directors, we can find: first of all, the dean will generally choose to have a certain reputation in the community of Confucianism, in the application to the higher level of approval of consent, hired into the college. For example, Hu Yong, Tang Jin and Rao Lu were all hired by the Nankang prefect南康知府. Secondly, the dean himself must have a high degree of learning and good moral character. Ou Yang Shoudao mentioned in *A Record of the Hall of the Chief Director at the Bai Luzhou Academy* 白鹭洲书院山长厅记 that «those who can be called deans are thought to be incapable of living here unless they have real talent and knowledge» 自是山长之称, 人以为非有实行粹学者莫宜居¹⁴. He should be able to attract the students to come to pursue their studies. Finally, the dean needs to undertake a lot of duties other than teaching and should be committed to the inheritance and development of the spirit of the academy in particular.

¹² (Song) Z.Q. Lv, *Bai Lu Dong Academy Ji* 白鹿洞书院记, in C.D. Li, Q.N. Xiong, *Bai Lu Dong Academy monument record collection*, Nanchang, Jiangxi Education Publishing House, 1995, p. 8.

¹³ (Song) W.W. Chen, *Reply to Du Shengzhi's Book Again* 再答杜升之书, in Id., *Chen KeZhai Ji*, Beijing, Zhonghua Book Company, 1985, pp. 30-31.

¹⁴ (Song) S.D. Ouyang, *The record of the dean of the Bai Lu Zhou Academy* 白鹭洲书院山长厅记, in Z.Z. Zeng, L. Liu, *All Song Texts*, Shanghai, Shanghai Lexicographical Publishing House, Hefei, Anhui Education Publishing House, 2006, Vol. 347, p. 89.

2.1.2. *Admission of Students to the Academy*

In terms of the source of students in the academy, on the one hand, under the influence of the «Example-Following» cultural tradition, the collection of great Neo-Confucianists naturally attracted apprentices from all over the world to study. On the other hand, it stems from the academy's initiative to enroll students.

When Zhu Xi rebuilt the Bai Ludong Academy, he posted a «recruitment provincial graduate into the academy» to convene the students. He thought that «today students of Bai Ludong academy have been scattered, this is the place where scholars can think and study hard» 今白鹿洞诸生各已散归, 正学者潜思进学之所¹⁵, indicating that the academy for students provides a meditative learning place of orientation. However, the scale of the academy itself and its resources are limited. For example, Bai Ludong Academy only has more than twenty huts and only one or two dozen students and disciples for the initial construction of funds; Yuelu Academy initially determined the number of 20, then added 10, and fixed the number of students at about 30. It is not difficult to find, not all students have the opportunity to enter the academy and have been studying in the academy, the academy itself will be in accordance with certain criteria for screening out.

Zhu Xi believes that scholars should learn to cultivate one's morality and pursue a higher realm, rather than stay on rote memorization and empty words. Students must be ambitious, «the book is not remembered, read can remember; the truth does not understand, serious thinking can understand; only ambition does not stand, straight is no force» 书不记, 熟读可记, 义不精, 细思可精, 唯有志不立, 直是无着力处¹⁶, which implies a certain standard of selection of students. Before students enroll in school, the first thing to go through is an examination of morality. For example, Yuelu Academy needs to «wait for in-service inspections and searches, and those who have been allocated to the program» 听候当职考察搜访, 径行拨入者, «all so that scholars know what they need to do, not exclusively in the area between the course test» 凡使为学者知所当务, 不专在于区区课试之间¹⁷. Lv Zuqian also emphasized in the Rules of the Lize Academy 丽泽书院学规 that «all the people who gather here should be filial piety, brotherhood, loyalty and faith-based» 凡此预集者, 以孝弟忠信为本, 以讲求经旨、明理躬行为本 and «should seek the scriptures, to understand the principles of reasoning and behavior». If people «who are not obedient to par-

¹⁵ (Song) X. Zhu, *Recruitment of provincial graduate to the academy* 招举人入书院状, in M.Y. Li et alii, *Bai Lu Dong Academy Gu Zhi Wu Zhong Shang*, Beijing, Zhonghua Book Company, 1995, p. 52.

¹⁶ (Song) X. Zhu, *And Oracle Scholars* 又谕学者, in Id., *Zhu Zi Quan Shu (Revised)*, cit., Vol. 24, p. 3594.

¹⁷ Id., *Tan Zhou Wei Jiao Shou Zhi Yuelu Academy Die* 潭州委教授措置岳麓书院牒, in (Ming) D.X. Wu et alii, *Yuelu Shuyuan Zhi Jing*, Changsha, Yuelu Press, 2012, p. 71.

ents, not friendly to brothers, not amicable to the clan, not sincere to friends, contrary to words and deeds, covering up faults and following mistakes»其不顺于父母, 不友于兄弟, 不睦于宗族, 不诚于朋友, 言行相反, 文过遂非者¹⁸, the academy will not admit them. In addition, some of the academies also need to examine the students' learning, such as Mingdao Academy Regulations clearly stipulates that «those who have the will, regardless of the distance, to visit the dean to enter the curtain, need to cite doubts and meanings of an article», in which only the 'literacy', can be invited into the Academy士之有志者, 不拘远近, 谒山长入状帘, 引疑义一篇, 其中只有文理通明者, 才能请入书院, so as to ensure the quality of the students of the academy¹⁹. Although Bai Lu Dong Academy did not put forward a clear standard of student admission, Zhu Xi also formulated the «Bai Lu Dong Shuyuan Reveal» during his tenure, requiring scholars to be asked to speak to each other about compliance and to lead by example. To a certain extent, it standardizes the daily learning life of the students of the academy.

Although at this time there were no specific requirements for students' origins, conduct and learning, it is not difficult to find out from the above rules. First of all, the students' conduct was put in the first place. For those who pursued fame and fortune as well as those who did not conform to the Confucian ethic of filial piety and fraternal duty, the academy would not be admitted, and even if they were admitted, they would be expelled from the academy if found to be of bad conduct. Secondly, students were required to have a certain degree of academic ability, to be able to question the defense and to seek the truth and understanding of the scriptures. Finally, the academy gradually developed strict admission criteria and began to control the number of students enrolled in the academy by means of inspections and examinations to ensure the quality of the students.

2.1.3. *A two-way trade-off between the two*

The selection of teachers and the admission of students to the academy are both quite strict, but the formation of a teacher-student relationship requires a two-way choice and trade-off between the two.

First, the teacher chooses the students. The selection of students by academy teachers is generally reflected in the acceptance of students. Students are

¹⁸ (Song) Z.Q. Lv, *The September Statute of the Fourth Year of the Qian Dao* 乾道四年九月规约, *The Statute of the Fifth Year of the Qian Dao* 乾道五年规约, in L.G. Huang, Z.L. Huang, *Lv Zuqian Quan Ji*, Hangzhou, Zhejiang Classics Publishing House, 2008, Vol. 1, pp. 359-361.

¹⁹ (Song) Y.H. Zhou, *Jing Ding Jian Kang Zhi* 景定建康志 (3), Nanjing, Nanjing Press, 2009, p. 763.

examined on the basis of their character, ability to learn and academic potential, and those who do not pass the examination are not admitted. At the same time, students should be able to identify with the teacher's values and teaching philosophy and resonate with them ideologically. Secondly, students choose their teachers. When students choose to study in the academy, in addition to focusing on the academy's tuition rewards, it is more important to seek teachers who match their aspirations. Therefore, when students choose the academy, they will first pay attention to the teachers in the academy, considering whether the academy has rich academic resources and strong teachers to support their academic development, and whether the teaching concepts and morality of the teachers in the academy are conducive to the growth of their personalities. To a certain extent, it depends on the rich charisma of the teachers.

On the whole, unlike the teacher-student relationships in government schools, where teachers were directly appointed by the government and students were also selected by the government, the two were rigidly bound together, while the teacher-student relationships in the academy were based on the free choice of the two. Teachers attract students with their noble moral character and culmination of learning, students regard teachers as «the path of the road to the guide and even the embodiment of the way of the saints», full of respect and admiration. Teachers insist on preaching, teaching and clarifying doubts, regard students as like-minded people and the inheritance and dissemination of academic ideas. They focus on personality development and fully tap the academic potential of the students. As a result, a solid foundation was laid for the close interaction between teachers and students in the academy.

2.2. Bridging the gap between teachers and students

2.2.1. Physical proximity: the inherent advantages of natural space

Since the establishment of the academy in the Tang Dynasty, most of the academies have been located in places with beautiful scenery. The external environment 'quiet' will often bring people's inner peace and calm. The isolation of the physical environment makes the academy far from the hustle and bustle of the world, making it an excellent place for reading and lecturing.

Zhu Xi in his role as the Nankang prefect period, examined the old site of the Bai Lu Dong Academy. He «looks at its four sides of the mountains and water, profound and secluded, no noise of the city, there are springs and stones of victory» 观其四面山水, 清邃环合, 无市井之喧, 有泉石之胜, that it is a «really pure lecture area» 真闲燕讲学之区 and «a place where people lecture,

live incognito and write books» 群居讲学遁迹著书之所²⁰. So he determined to rebuild the Bai Lu Dong Academy, which led to its later brilliant development. Yue Lu Academy is also in a place of «quiet, deep and pure», and its «scenic beauty of mountains and rivers» makes people «wander around and be reluctant to leave». Yuan Xie's description of its environment in *Record of the East Lake Academy* 东湖书院记 makes people «long for it»:

The long embankment is surrounded by willows, the water shines brightly, the lotus flowers are red, as brilliant as a cloud of brocade, and it is heavily lined with ancient trees and flying beams, which makes it a wonderful place to visit

长堤回环, 柳荫四合, 水光照耀, 芙蓉舒红, 灿如云锦, 重之以古木森列飞梁之外, 佳致无穷²¹.

Yuan Fu's description of the Xiang Shan Academy in his *Essay of the First Establishment of the Academy to Mr. Lu Xiangshan* 初建书院告陆象山先生文 says that it is

Near to the mountains and I am pleased to consult with you, and I am pleased that I am able to obtain the best scenery in Xuyan, which is not too far from the mountains, but surrounded by three mountains. The three mountains are surrounded by a high hill that can be looked up to, and a large stream that can be cleaned, all created by heaven and earth

山之旁近, 爱咨爱度, 得胜境于徐岩, 离家山而非邈, 三山环峙兮高可仰, 大溪横陈兮清可濯, 殆天造而地设²².

In addition, there are Shi Gu Academy, Tai Shan Academy, Song Yang Academy and so on, which are all built according to the mountains and forests.

In the innate natural spatial advantage, all kinds of buildings in the academy are relatively centralized, which invariably brings students and teachers closer to each other in terms of physical interaction. Take the Bai Lu Dong Academy for example, the courtyard buildings can be roughly divided into six categories: one for the ritual class building, such as Zhu Xi in the restoration of the Bai Lu Dong Academy construct the Hall of Li Sheng, «respectfully repairing the rituals of the Shicai» 恭修释菜之礼 and worship sages to inherit the excellent cultural traditions and cultivate the students' moral qualities and cultivation of learning. The second is for the lecture building, such as the Princely Man Hall, the Minglun Hall and the Classics Hall. The third is a

²⁰ (Song) X. Zhu, *Bai Lu Dong Die* 白鹿洞牒, in Li et alii, *Bai Lu Dong Academy Gu Zhi Wu Zhong Shang*, cit., p. 236.

²¹ (Song) X. Yuan, *Dong Hu Academy Ji* 东湖书院记, in Peking University's center of compilation and research, *Ru Cang*, Beijing, Peking University Press, 2012, pp. 835-836.

²² (Song) F. Yuan, *Essay of the First Establishment of the Academy to Mr. Lu Xiangshan* 初建书院告陆象山先生文, in Id., *Meng Zhai Ji (4)*, Beijing, The Commercial Press, 1925, p. 242.

book collection building, such as the Yunzhang Pavilion. The fourth is living buildings. There are special to guests living in the «guest of the pavilion», there are officials on duty residence «Zhi She», and there are students of the academy of the lodging place «Zhai She». Five for the pavilion building. The natural environment of the academy is very suitable for the construction of the pavilion this kind of ornamental building, in the pavilion where teachers and students discuss the circuit, or enjoy the scenery, giving a unique cultural connotation. For example, the Feng Yu pavilion is «more than a hundred feet high, surrounded by the placement of the stone, on the shade of the bridge wood, the next down to the stream»高百余尺, 环置石鹿, 上荫桥木, 下俯溪流²³, Zhu Xi and his students often sit on the Feng Yu stone to debate the Confucian together. Six for the bridge type of building, such as Guandao Bridge, pillow flow bridge, and so on. The centralized nature of the building provides spatial external possibilities for close interaction between teachers and students.

In this kind of «pure and clear space», teachers and students can often get rid of the heart of profit and fortune, guard against arrogance and impatience, cultivate the heart and concentrate on their studies. The tranquil environment of the academy provides a good friendship with the external conditions for teachers and students.

2.2.2. Bringing psychological distance closer: integration of natural, educational and living spaces

In the government school system, teachers and students are often «as indifferent as people on the road», and rarely produce exchanges, not only the lack of deep academic exchanges, but there is also a certain emotional divide. The deep integration of natural space and educational space, educational space and living space in the academy breaks this divide very well.

On the one hand, the natural space of the academy is integrated with the educational space, giving the natural environment an educational connotation, and at the same time internalizing the righteousness of the natural environment in the students. Students not only learn the Tao in various lectures but also experience the Tao in the natural environment. The Neo-Confucian seeks the harmony between the heaven and human, emphasizing the unity of man and the natural environment. Zhu Xi believes that heaven is spread in the natural environment of things, so a benevolent person should «be one with all things in heaven and earth». In order to realize that, we must insist on the principle of knowledge of things, and to know the reason why things are

²³ G.F. Wu, H. Ni, *Chinese academy culture series Bai Lu Dong Academy*, Changsha, Hunan University Press, 2013, p. 181.

what they are, and then to know the principle of what they are of course. The beautiful natural environment itself is endowed with the connotation of righteousness, art, Taoism and reasoning are connected, in which students realize and seek Taoism, and the natural space and the educational space realize the deep integration.

On the other hand, the educational space of the academy is integrated with the living space, and the concentration of various types of buildings in the academy makes the functions of different places not have obvious spatial boundaries, which seem to be dispersed but are actually integrated. The concentration of various buildings makes the living space and teaching space inseparable. The pavilion building can be used for students to play or strum a lute or other stringed instrument and chess and other daily life leisure activities but also learn and debate in the pavilion each other. Students will also name their dormitory. For example, «take the *Learn* of phase view and the meaning of good, named ‘Guan Shan lodge’» 取学记相观而善之义, 命之曰 观善之斋²⁴. In addition, students will give certain cultural connotations to the living buildings, encouraging themselves at all times.

Pavilions in the academy are not only places for teachers and students to live together but also cultural and educational places for teachers and students to learn and debate together. The concentration of physical distance makes the functions of each place interchangeable. The teachers and students have positive common experiences, thus showing a stronger willingness to interact and trust, further narrowing the psychological distance between teachers and students.

2.3. *Emotional resonance between teachers and students*

Human interaction is a continuous interactive process, teachers and students to form long-lasting solid emotional ties. It lies in the sincere emotional exchanges between the two, the more critical is to form an internal sense of value identity, with a common pursuit of value, that is, through the close academic interaction between the two, the formation of solid emotional ties.

²⁴ (Song) X. Zhu, *Wuyi jingshe miscellaneous aria poem preface* 武夷精舍杂咏诗序, in *Wuyi Mountain Zhu Xi Research Center, Wuyi wins the realm of science relics examination*, Shanghai, Sanlian bookstore Shanghai branch, 1990, p. 197.

2.3.1. *Academic regulations: excellent in character and learning, both rewards and penalties*

Since the Song Dynasty, the academic rules and regulations of the academy have been continuously improved, with strict requirements for students' daily lives and studies. On the one hand, students internalized the value system of the academy while abiding by these rules and formed a kind of value compliance with the teachers. On the other hand, through the daily admonitions and teachings of the teachers, students would also be grateful to the teachers and feel more charisma of the teachers' personalities.

Zhu Xi believes that the establishment of academic rules does not need to set up a more complicated statute entry. «Rules are a protective device, not to wait for others to set up and then have to follow», but also «great for each other» 规矩禁防之具, 岂待他人设之而后有所持循, 同时也是大为之防, 似不足以相浼. In the *Bai Lu Dong Academy Reveals*, Zhu Xi first emphasized the academy students to do the most basic moral requirements, namely, «there is a kinship between father and son, justice between ruler and subject, separation between husband and wife, order among the young and the old, and trust among friends» 父子有亲, 君臣有义, 夫妇有别, 长幼有序, 朋友有信. In the learning aspect, he emphasized that understanding through the four elements of «learning, questioning, thinking and discerning», and «discipline wrath, remove covetousness, work toward good, and put away transgressions» 以学、问、思、辨四者穷理致知, 以惩忿窒欲, 迁善改过. In terms of dealing with people, people should correct the attitude of interaction with others. A virtuous person should rectify his behavior and conform to the standards of justice rather than act for personal gain; at the same time, he should preach and practice correct principles and morals rather than be overly concerned with personal merit or achievement and should not aim at personal gain or merit in his dealings and actions. In the treatment of people, «do not do unto others what you would not have them do unto you», and when you «fail to act», «turn the tables on yourself». Although there were no detailed rules and regulations, the teaching philosophy and value orientation of the later generations of academies were laid down on the whole. Teachers and students observed the same value system, pursued the noble character of sages, and refrained from «fishing for fame and fortune».

In addition, some other academies added more specific rules and regulations on the basis of Zhu Xi's *Bai Lu Dong Academy reveals* in order to supervise the students' daily study. For example, *Ming Dao Academy Regulations* have made detailed provisions for students' classes, answering questions, examinations and so on. «Those with excellent grades will be recorded in the academy's Deye Book» 文理优者, 传斋书德业簿. For those whose leave of absence is not recorded in the book and those who violate the rules, dismissal will be considered. Lv Zuqian also made detailed regulations on students' behavior

and conduct, and the way of learning in the rules of Lize Academy, with clear rewards and punishments. For the students' daily questions, it is necessary to «set up a special book to record, comrades meet at different times, each out of the study and doubt, and discuss with each other»置专册记录, 同志异时相会, 各出所习及所疑, 互相商榷. For the students' daily study, «the daily record of the study in the book, more or less at will»日纪所习于簿, 多寡随意²⁵. A strict management system on the one hand, is to help students develop good learning habits; on the other hand, the teacher's admonition punishment can also reflect the degree of its attention to students' care and enrich the common experience between teachers and students.

In general, under this institutionalized management, teachers and students in the academy will consciously regulate their behavior. Teachers will answer questions for students, «and then know the difficulties they encountered», and students will record what they learn every day, «and then know the shortcomings», so as to realize the mutual growth of teaching and learning. Under the guidance of common values, the Neo-Confucian value system is continuously internalized in students' hearts, and they gradually change from «I» to «we» psychologically, forming a strong emotional connection between teachers and students.

2.3.2. *Lecturing: seeking the truth together, discussing and learning from each other by exchanging views*

In addition to daily teaching, the academy will also invite other prestigious scholars or educated officials to give lectures. In the Song Dynasty, the style of lecturing in the academy flourished, with one person as the teacher and hundreds of disciples gathered. As a result, it has triggered the exchange and debate between different scholars, the consultation and questioning between teachers and students, as well as the exchange and discussion between students and students. Strong emotional resonance is formed between teachers and students.

When Zhu Xi served as the dean of Bai Lu Dong Academy, he personally lectured around the orthodoxy of Confucianism, guiding students to think about

Yang, Mo's sayings are extinguished, but the flow of their sayings, is not there also have not been extinguished? In later times, there were the sayings of Buddha and Laozi, which were the same as those of Yang and Mo, or different from them? Since Yang Xiong, the

²⁵ (Song) Lv, *The September Statute of the Fourth Year of the Qian Dao* 乾道四年九月规约, *The Statute of the Fifth Year of the Qian Dao* 乾道五年规约, cit., Vol. 1, pp. 359-361.

two schools of right and wrong arguments, cover also many different people, and which is the right one?

杨、墨之说则熄也，然其说之流，岂亦无有未尽泯灭者耶？后世有佛、老之说，其与杨、墨之说同耶，异耶？自杨雄以来，于是二家是非之论，盖亦多不同者，又孰为得其正耶²⁶？

In addition, Zhu Xi will also invite other Neo-Confucianists to give lectures. Famous scholars such as Lu Jiubuan, Liu Qingzhi, and Lin Zizhi all came to give lectures. The most famous of these is Lu Jiuyuan's teaching of the Analects of Confucius in the cave, which states that «the gentleman is a metaphor for righteousness and the villain is a metaphor for profit», and points out that «the metaphor of a person is determined by what he learns, and what he learns is determined by what he aspires to do»²⁷. Zhu Xi evaluated «to its so invented perfunctory, and then pleading to understand, and all have to cut in the scholars hidden micro deep confinement of the disease, cover the listener is not creeping moving heart»至其所以发明敷畅，则又愚到明白，而皆有以切中学者隐微深锢之病，盖听者莫不悚然动心焉。As long as you study carefully and reflect, you can not be lost in the side of virtue²⁸. Yuan Fu, who was the supervisor of Jiangdong, couldn't help but sigh that Mr. Nanxuan, Mr. Huian and Mr. Xiangshan were all «the great section of the former sage», and their «work of preaching, which had not been seen at that time, but in the more visible»讲道之功，当时未见也，而见于更化²⁹. Chen Wenwei met Du Shengzhi when he traveled to Bai Lu Dong Academy and discussed his lectures on «many things will happen in the future, and with the change of things, there will be fewer and more deaths, and it will be difficult to be intermittent»日后多事，随物变迁，存少亡多，不胜断续as well as «if you want to save and nourish yourself, you can only wait for the quiet time, and I am afraid that those who are overwhelmed by the time are hard to get the quiet time»若欲存养者，惟待静时，恐应接不暇者，多难得静。He wrote *A Reply to the Book of Du Shengzhi of Bai Lu Dong* and *A Reply to the Book of Du Shengzhi* 答白鹿洞杜升之书与再答杜升之书。In addition, there is the famous Zhu Zhang's meeting. In the Yuelu Academy and Chengnan Academy, Zhu Xi and Zhang Xi debated the issues of «Weifa» and «Yifa» of the doctrine of «Zhongyong». In the discussion of three days and three nights, there is still a certain amount of disagreement, but the two said that they have benefited a lot. After Zhu Xi re-

²⁶ (Song) X. Zhu, *Bai Lu Dong Academy Questioning* 白鹿洞书堂策问, in Q. Guo, B. Yin, *Zhu Xi Ji* 7, Chengdu, Sichuan Education Publishing House, 1996, p. 3884.

²⁷ (Song) J.Y. Lu, *Bai Lu Dong Academy handouts* 白鹿书堂讲义, in Li et alii, *Bai Lu Dong Academy Gu Zhi Wu Zhong Shang*, cit., pp. 74-75.

²⁸ (Song) X. Zhu, *After the Lecture on the Book Hall of Bai Lu Dong Academy by Master Lu of Jinxi* 跋金溪陆主簿白鹿洞书堂讲义后, in Id., *Zhu Zi Quan Shu (Revised)*, cit., Vol. 24, pp. 3582-3583.

²⁹ (Song) F. Yuan, *Re-establishing the Bai Lu Dong Academy* 重修白鹿书院记, in Li, Xiong, *Bai Lu Dong Academy monument record collection*, cit., p. 15.

turned, he said, «Last winter in Huxiang, the benefit of the lecture quite a lot» 去冬走湖湘, 讲论之益不少³⁰. Through this conference, each gave the other a key influence that led to the refinement and systematization of their ideas. This created a precedent for the meeting of lectures between different schools of thought in the academy.

In this academic atmosphere of questioning and debating and preaching together, teachers and students are no longer limited to the relationship between teaching and learning but gradually formed a kind of «learning from each other and discussing the classics together, in the process of understanding, realization, practice the way of the process of mutual promotion and enlightenment of the academic community» 相互切磋砥砺、相与讲明其道, 在领悟、体认、践履道的过程中相互促进、启发的学术共同体. Teachers with profound knowledge and charisma attract and inspire students. Students' humble attitude to learning and sincere heart for learning will also inspire the teacher's expectations, happiness, and other positive emotional experiences. Teachers and students form emotional resonance based on morality and the common goal of understanding and seeking morality.

3. *The Basic Characteristics and Value Implications of Teacher-Student Relationships in Song Dynasty Academies*

3.1. *Basic features*

The formation of the teacher-student relationship in the academy begins with a firm two-way choice, relies on the physical and psychological distance, is refined by high-quality consultation and refinement, and finally forms a long-lasting and solid emotional connection. In the process of overall construction, the basic characteristics of equal communication, long-lasting stability and deep feelings are formed.

3.1.1. *Equal communication between teachers and students*

China's ancient teacher-student relationship emphasizes the dignity of the teacher, students should maintain respect and admiration for teachers. As early as in the *Records of Rites – Records of Learning*, there are pointed out that «in all the ways of learning, it is most difficult to honor the teacher». «When a

³⁰ (Song) X. Zhu, *A Reply to Cheng Yunfu* 答程允夫, in Id., *Zhu Zi Quan Shu (Revised)*, cit., Vol. 22, p. 1871.

teacher is honored, the truth and knowledge he teaches will then be respected. When the knowledge is honored and then the people know the respect for learning»凡学之道，严师为难。师严然后道尊，道尊然后民知敬学³¹. As an important position of Neo-Confucianism, the academy inherits and develops the Confucian dignity of the teacher.

On the one hand, the teacher-student relationship is one of equality, with the teacher treating all students as his children, and all students believing and loving them as his father and brother. Teachers and students are equal in terms of personality, emotion and other aspects, and the two should not be the relationship between guided and be guided or supervised and be supervised. Confucius and Mencius in the disciples, called themselves elders. «Old» means older than age and experience for ‘young’. As if the disciples of the father and brother of the children, teachers and students get along more like brothers. It invisibly narrows the psychological distance between teachers and students, educational behavior is more likely to occur. Zhu Xi in the reconstruction of the Bai Lu Dong Academy enrollment, pointed out that as long as the students are willing to come here to study, will provide accommodation and food. For the Yuelu Academy, «the aspiring scholar from thousands of miles away to seek a teacher to make friends», but there is no place to live in the difficulties, Zhu Xi put forward «increasing the quota by ten» while providing one liter of four hectoliters of rice per day and sixty cents of treats. Fan Zhongyan has also taken out his salary to fund the «four sides traveling scholar», to help them study. From this, we can see that the teachers love and care for the students. In addition, teachers and students would actively discuss and exchange ideas during their daily lectures. In the teaching place of the academy, there is a lecture in the middle and listening positions around it. Teachers and students talk about the questions and answers with each other, and often «hate at that time so that the consultation is not yet finished» 又恨当时所以相切磋者犹有所未尽。At this time, teachers and students for equal academic exchanges, the two interact harmoniously, and seek common reasoning.

On the other hand, the nature of the teacher-student relationship is the nature of education. On the basis of equal communication, the teacher is the student’s academic guide and the personality development of the leader. «A teacher is someone who imparts knowledge, teaches academics, and answers questions» 师者，所以传道授业解惑也。Teachers «It can lead all the sages, advocate with one heart, not to their private intermediary in the chest, then the students have to view the law»若能领袖诸贤，同心倡导，不以彼己之私介于胸中，则后生有所观法³². So the teacher must continuously cultivate moral char-

³¹ G.W. Cui, *The Book of Rite*礼记, Shenyang, Liaoning Education Publishing House, 2000, p. 124.

³² (Ming) T.H. Zheng, *Showing the Master of Bai Lu Dong*示白鹿洞主帖, in H.B. Deng, *The Collection of Chinese Academy Rules*, Shanghai, Zhongxi Company, 2011, Vol. 2, p. 652.

acter and improve himself 正身修德, and serve as a role model among students. In their daily lives, students must not «bully their teachers and friends» and «insult the sages». For students' questions, teachers are often tireless to answer. Academically they see students diligently learning, then «happy to see in words», and if they find that students' progress is slow, and every time «face light up with worry». *Zhu Xi's Annals* 朱熹年谱 recorded that Zhu Xi takes a lot of work to govern the districts, but in the evening discussed with students, «slightly without tiredness». He taught students to be practical, «do not hate the humble near and admire the high and distant» 毋厌卑近而慕高远. «Sincerity» to the hearers is touched 恳恻至到, 闻者无不感动. However, the teacher is only a guide, to be a proof, discussing difficulties with students only. The key is still for students to realize and cultivate themselves. Encourage students to think independently and focus on the development of student autonomy.

3.1.2. *Strong and long-lasting relationships between teachers and students*

In the Song Dynasty academy, teachers and students gradually formed an emotional and academic community in the process of friendship and sincere communication. Therefore, the relationship between teachers and students is not based on the survival of the academy and the teacher's position. To a certain extent, the academy becomes the emotional support of teachers and students. The shared emotional experience of 'being present' has led to a deepening of the teacher-student bond.

Zhu Xi impeached Song Ningzong's relative Han Chazhou stole the power of the loss, by their hatred was denounced as a «pseudo-scholarship leader», and was dismissed from office and deposed. At the same time, in the Qingyuan party ban 庆元党禁, Zhu Xi's student Cai Yuanding could not escape their fate and was relegated to the southern barbaric land of Daozhou. But he «left without going home to say goodbye», acting openly and «not differently than usual». Although Zhu Xi was also in danger, at this time he still insisted on inviting disciplines to host a farewell banquet which can be seen how much he loved and cared for his students. Cai Yuanding also immediately wrote the poem «Never live up to what I've learned, and the heart is known to heaven» 断不负所学, 此心天所知, which expressed the surface of his heart of self-confidence and openness. Jiang Wanli, Wen Tianxiang's teacher, encouraged him to «observe the time and personnel, there will be changes. The responsibility of the world is in the gentleman, the gentleman must be encouraged» 观天时人事, 必当有变。世道之责, 其在君乎, 君必勉之, earnest expectations overflowing. Wen Tianxiang finally also shows «life from ancient times who have no death, to take the heart of Khan Qing» 人生自古谁无死, 留取丹心照汗青 of the steadfastness of the sentiment. It can be seen that even if teachers and students

are no longer in the same field, they can still show similar emotional attitudes, behavior and value choices.

For disciples, «once a teacher, always a father» 一日为师终身为父. After Zhu Xi's death, Li Fan, Zhou Mo and other students defied the imperial court to hold a funeral for him. Thousands of people attended the funeral, and a large number of students ventured to, which Huang Gan is dedicated to its mourning for three years. With Zhu Xi's contemporaries Lu Jiuyuan, after his death the disciples nearly a thousand people who wailed and mourned. Students and disciples all miss the gentleman's high moral character. Yuan Fu praised Lu Jiuyuan's mind hermeneutics心学 as «up to the ancient sages, down to the world», «the scholar's heart that his heart»上接古圣, 下垂万世, 学者之心即先生之心. Ou Yangshoudao was known for his integrity when teaching as an official, and he died without a penny of the accumulation. Only his students donate funds to be able to bury him in the coffin. Teachers and students can be seen in the deep emotion.

3.2. Value Implications

The relationship between teachers and students in the academy with deep and intimate feelings, not only contributed to the prosperity of the academy itself but also promoted the dissemination and development of Neo-Confucianism at that time. Besides, it maintained the dominance of Confucianism, and thus brought about the purification of the social atmosphere, and pushed forward the reform and renewal of the entire social system.

3.2.1. *Passing on the academic tradition and inheriting the doctrine of the division* 传承学术传统, 光大师说

The rejuvenation of the academy lies in the understanding of reason and the search for Taoism明理求道, «to discern the way of friendship and utilitarianism, so that the scholar's heart will not be ignorant of the tendency»欲力辨道谊功利, 使士心之不昧所趋³³. Teachers and students make friends with each other through Taoism, advance together in Taoism, and eventually form a like-minded academic community. At the same time, while adhering to the inheritance of teachers and the theory of the Master, it also promotes the dissemination and development of the Neo-Confucianism system.

³³ (Song) Yuan, *Re-establishing the Bai Lu Dong Academy*重修白鹿书院记, cit., p. 14.

On the one hand, through the «hundred schools of thought» type of lecture system, the exchange between teachers and students has greatly promoted the renewal and improvement of the Neo-Confucianism system. In the Southern Song Dynasty, the famous academies gathered a group of great Neo-Confucianists and formed different academic schools. For example, Zhang Shi, Lv Zuqian, Zhu Xi and Lu Jiuyuan formed the Huxiang School, Wuxue School, Kaoshan School and Xiangshan School respectively. The teachers and students of the four schools of thought often carry out various academic exchanges, and Zhu Zhang reached a lot of consensus after the Yuelu meeting, such as Zhu Xi advocated the ‘practice’ of the realization of the ‘prophet’ that is affected by the views of the Hunan school. At the Goose Lake meeting, Zhu and Lu discussed their academic differences, i.e., whether to emphasize the «knowledge of material things» or to insist on the «invention of the original mind», and debated with each other. Although they were unable to reach a consensus, they were also able to realize the flourishing situation of academic controversy, which further improved the system of science at that time. And then Zhu Xi also invited Lu Jiuyuan to lecture in the cave, reflecting the free academic atmosphere of eclecticism at that time. In the midst of the free lectures of the academy, students from all over the world «heard the wind and came to gather». When Zhu Zhang met in the academy, it is said that the people who came to listen to the lecture filled up the aisle of the lecture hall, and for a while the crowd of the public carriage and horses, and the water of the drinking pool dried up—*一时舆马之众，饮池水立涸*, which greatly promoted the spread of Neo-Confucianism. In this kind of high-quality interaction between teachers and students as well as students and students, teachers and students questioned and debated with each other, constantly raising new questions and integrating new ideas and viewpoints, which resulted in the development of a prosperous academic scene.

On the other hand, the long-lasting and solid emotional connection between teacher and student has enabled the disciples to carry on the legacy and the spiritual character of the sages through the reconstruction and revitalization of the academy, and through the teaching of apprenticeships and lectures. All of them faithfully practiced the teachings of their teachers and kept the teachings of their teachers. At the same time, they pass on the Taoism tradition and the Way of the Master through the collection of books and writings and the establishment of academic rules. In addition, students often became the successors and disseminators of their teachers’ academic ideas by giving lectures and founding schools. Yuan Fu for «the spirit of Mr. House, Zhen Mr. Benduo» *宅先生之精神，振先生之本铎*, to inherit and develop Lu Jiuyuan’s mind hermeneutics, founded the Xiangshan Academy «to restore the old and the wisdom of the later» *复摩旧本，以慧后学*, which will develop the school of doctrine. Zhu Xi’s disciples, such as Huang Gan, Li Fan and Chen Wenwei founded the academy to disseminate and study Neo-Confucianism

ideas. When Huang Gan saw the restoration and revitalization of the Bai Lu Dong once again, «I grieve that I will never see the past. I am glad to see the goodness of the Marquis» 既悲往哲之不复见, 又喜贤侯之善继其志. The deep friendship between teachers and students not only promoted the inheritance and dissemination of teachers' academic ideas but also promoted the sustainable development of the academy itself.

3.2.2. *Promoting the development of Confucianism and purifying the social atmosphere*

Firstly, the teacher-student relationship of the academy purified the impetuous social atmosphere at that time and safeguarded the ethical value system of Confucianism. The development of the academies in the Southern Song Dynasty itself was promoted by the long-standing evils of the official schools. Neo-Confucians have always been critical of the culture of official schools, in which teachers and students sought to learn for the sake of profit and fortune. In addition, Buddhism and Laozi prevailed in the Song Dynasty. The territory of the temple is full of the sounds of bells and drums, with the coffin abandoned Yigiao and talking about empty fantasy 境内寺观钟鼓相闻, 殓弃彝伦, 谈空说幻. To a certain extent, it shakes the sole status of Confucianism. In the view of the Neo-Confucians, the study of the Buddha and the Laozi is considered «heresies». Zhu Xi believes that Confucianism and Buddhism for the «difference between the real and the virtual», the two «speech different places» pragmatic and vacuous differences.

Shishi's so-called respect to straight inside, just empty and unambiguous ground, there is nothing more, but will not be square outside. The saint's so-called respect to the straight inside, then the Chamran virtual bright, all the reason is sufficient, can be righteous to square outside

释氏所谓敬以直内, 只是空豁豁地, 更无一物, 却不会方外。圣人所谓敬以直内, 则湛然虚明, 万理具足, 方能义以方外³⁴。

The lectures in the academy and the discussions between teachers and students promoted the development and dissemination of Neo-Confucianism, and at the same time, formed a counterweight to the preaching of Buddhism and Laozi, which helped Confucianism to reshape its value system, and pushed it to return to the orthodox status.

Secondly, the emotional and academic community formed by the teachers and students of the academy enters the society and influences the value beliefs

³⁴ (Song) J.D. Li, *Zhu Zi Yu Lei* 朱子语类, Changsha, Yuelu Press, 1997, Vol. 4, p. 2720.

of the whole society with its consistent behavior and value choices. Cultivating talents and teaching students is the basic function of the development of the academy. Teachers instill various Confucian moral values in students during the teaching process, and students gradually internalize them into their value system and form a sense of value identity. The two became an academic community. Students were mostly committed to the teachings of the masters, inheriting the way of the teachers, insisting on cultivating themselves and establishing themselves. Through the dissemination of the Confucian ethical value system, they were committed to the establishment of a value belief system in the society that conformed to the concepts of Confucianism, which in essence also maintained the feudal rule of the society. At the same time, «the talents of the Song Dynasty were still mostly found in the Xuegong, not just in the academies». The students who had accepted the values of Neo-Confucianism became officials and entered the ruling class of the society. They politicized the concepts of Confucianism to form effective communication and dialogue between the state and society, and to promote the formation of a social culture that advocated righteousness over profit and the pursuit of inner sainthood and outer kingship.

Percorsi generativi di Letteratura per l'Infanzia

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Generative Paths of Children's Literature

ABSTRACT: This paper aims to analyze children's literature as a «generative device». In the perspective of the paradigm of Pedagogical Generativity by Emiliana Mannese, this «generative device» fulfills a transformative function, becoming a cipher of a possible change, capable of orienting the construction of new educational paths that are capable of welcoming and facing the «challenges of complexity». Children's literature as a «generative device» is a relational process that interprets the «categories of learning and knowledge as a non-place of educational change». It is structured in the educational relationship. It is in this awareness that the complex process that has characterized children's literature is inscribed, as historically a secondary handmaiden of the literary system. On the generative side, this process has been at the center of a recent reflection on the crisis of narration. This crisis is understood as an indistinctness between being and information, an indistinctness that underlines the need to put Knowledge-Sharing Communities back at the center as Narrative Communities. For some time now, children's literature has acquired that educational centrality and that epistemic autonomy that «manages to definitively put aside the artificial and dangerous operation supported by the historiography of the sector that, for a long part of the twentieth century, continued to distinguish between narrative production in the strict sense and production of a didactic, informative, edifying and scholastic nature». Therefore, the discipline is enriched with numerous interpretative keys that have had the merit of shifting the focus of attention from the marginal role of children's literature in the literary system tout court to the centrality of the pedagogical dimension that children's literature assumes in the capacity to construct complex schemes and thought processes. In the first case, it is a question of overcoming that prejudicial marginality of Croce's type; in the second case, of distinguishing in the epistemic structure of the discipline the literary function that concerns the analysis, study and meaning of the text, from the generative function that acts, working on the World-System, on the processes of construction of meaning and thought. Starting from the research of dynamic neuroscience, the generative function of children's literature has highlighted the centrality of reading processes in the construction of thought and culture. It starts from the principle according to which reading allows the Human to go through

information, to elaborate it and to transform it into Knowledge. If it is true, as Doidge writes, that culture transforms the brain, in our perspective, reading transforms knowledge to form Thought, making it dynamic and plastic. In this direction, we can identify the epistemological coordinates and methodological paths that have guided the drafting of this contribution. The epistemological coordinates refer to the paradigm of Generative Pedagogy by Emiliana Mannese which is specified as a theory of Learning, Guidance and Thought, characterized by a constant search for transdisciplinary integration between Subject-Person and System-World.

EY/TEE KEYWORDS: Children's Literature; Educational Relationship; Pedagogical Generativity; Narrative Communities.

1. *Storia della relazione educativa in ottica generativa*

Relazione educativa diviene il primo lemma mediante il quale è possibile analizzare, nella prospettiva di ricerca che presentiamo, i percorsi generativi di letteratura per l'infanzia a scuola.

La scuola, infatti può rappresentare il primo spazio sistematizzato in cui la letteratura per l'infanzia come dispositivo generativo può realizzarsi. La letteratura per l'infanzia in ottica generativa è sempre un processo relazionale: questo principio implica la necessità di una formazione generativa¹ che consenta all'educatore di attivare, a partire dalla relazione educativa, il dispositivo generativo.

Occorre, dunque, conoscere i processi di acquisizione della lettura, che in ottica generativa fanno riferimento al paradigma delle neuroscienze dinamiche poiché, come scrive Doidge «malgrado non tutti utilizzino le stesse aree cerebrali per leggere, dato che il cervello è plastico, vi sono tuttavia dei circuiti tipici per la lettura – un'evidenza fisica per cui l'attività culturale conduce a strutture cerebrali modificate»².

Una volta acquisite le informazioni relative ai processi di lettura il docente potrà distinguere, nella lettura dei testi da proporre, la funzione generativa dalla funzione letteraria. Se la funzione letteraria riguarda l'analisi, lo studio e il significato del testo, la funzione generativa lavorando sul Sistema Mondo agisce sui processi di costruzione di significato e di pensiero. In questa direzione la letteratura per l'infanzia diviene uno strumento³ pedagogico che il docente è in grado di destrutturare e ri-costruire adeguandolo alle diverse

¹ M.G. Lombardi, *La formazione degli insegnanti in prospettiva generativa*, in A.L. Rizzo, V. Ricciardi (edd.). *La formazione degli insegnanti: problemi, prospettive e proposte per una scuola di qualità e aperta a tutti e tutte*, Lecce, Pensa Multimedia, 2022, pp. 6-10.

² N. Doidge, *Il cervello infinito. Alle frontiere della neuroscienza: storie di persone che hanno cambiato il proprio cervello*, Milano, Casa Editrice Ponte alle Grazie, 2007, p. 307.

³ Il termine strumento viene qui inteso in senso figurato, ovvero il mezzo attraverso cui nella relazione educativa è possibile attivare il dispositivo generativo di co-costruzione in senso evolutivo e dinamico, di processi complessi di conoscenza attraverso cui il soggetto pensa l'esperienza proiettandosi nei non-luoghi della latenza pedagogica attraverso il Pensiero.

esigenze di contesto nella relazione educativa. Per comprendere il senso della relazione educativa in ottica generativa è necessario ri-costruire l'origine della relazione educativa.

Diversi sono gli studi che nel corso del tempo ci hanno consentito di ricostruire la storia della relazione educativa. Nello specifico questo lavoro è l'esito di una riflessione che nel 2014⁴ ci ha visto riflettere sulla ricostruzione storica della relazione educativa scolastica evidenziando alcune peculiarità che hanno caratterizzato la relazione educativa nella storia dell'Occidente, attraverso un'indagine pedagogico-ermeneutica di elementi storico-filosofici, dottrine educative, prospettive scientifiche e concezioni etiche, politiche e religiose⁵.

L'obiettivo duplice di tale indagine mira, da una parte, a rinvenire quei tratti pedagogici ricorrenti che connotano la relazione educativa scolastica e sostanziano l'azione educativo-formativa della professionalità docente, dall'altra, si vuole sottolineare la poliedricità e complessità di tale relazione che nel corso dei secoli si connette in maniera dinamica con il sapere pedagogico⁶.

Come messo in luce da Giuseppe Mari (2009), la cui opera *La relazione educativa* è stata la fonte privilegiata della ricostruzione storica di tale categoria pedagogica, già nell'età arcaica è possibile rintracciare alcuni elementi propri della relazione educativa nell'Iliade di Omero, attraverso il riferimento all'educazione di Achille da parte di Fenice, maestro di armi e di parola⁷ e il breve rimando a Chirone «il più giusto fra i centauri»⁸.

Se sul piano pedagogico tale fonte non esplicita metodi e pratiche educative, ne risulta una inconfutabile valenza sul versante storico-pedagogico: è possibile desumere sin dall'età arcaica l'importanza della componente comunicativa nella relazione docente-discente e la valorizzazione del «rapporto interpersonale (incluso quello tra educatore ed educando) non solo secondo un ordine di tipo gerarchico, ma anche con una visibile partecipazione personale»⁹.

Il significato culturale e pedagogico della relazione educativa nella storia dell'Occidente emerge dai documenti che sono pervenuti fino ad oggi, combi-

⁴ M.G. Lombardi, *Competenze nella responsabilità. L'educativo scolastico*, Pisa, Edizioni ETS, 2014.

⁵ L'idea che guida il presente lavoro, infatti, è che proprio a partire dal concetto di relazione educativa, che si è sviluppato nei secoli, dalle caratteristiche emergenti, dalle modalità attraverso cui esse si sono costruite nel tempo, sia possibile recuperare il *senso* della relazionalità educante, pur nella consapevolezza dei limiti derivanti dalla complessità della storia della relazione educativa, che non si ha certo la pretesa di sintetizzare.

⁶ Sull'autopercezione dell'agire professionale dell'insegnante oggi tra professione, professionalità e professionalizzazione: M.G. Lombardi, *Ripensare la professionalità docente*, «Nuova Secondaria», (sezione Nuova Secondaria Ricerca), n. 1, 2013.

⁷ *Iliade*, IX, 607; trad. di V. Monti, Firenze, La Nuova Italia, 1950.

⁸ *Iliade*, XI, 832, cit.

⁹ G. Mari, *La relazione educativa*, Brescia, La Scuola, 2019, p. 12.

nando senso di appartenenza, volontà di condivisione e strutturazione gerarchica¹⁰.

I caratteri dell'asimmetria, della partecipazione, del nesso affettività-autorità, contraddistinguono la relazione educativa a partire dall'età arcaica e sono presenti nel *thiasos pitagorico*, la più antica istituzione di natura pedagogica¹¹, luogo e modalità relazionale al contempo, preposto all'ascolto del maestro, un ascolto denso di rispetto per l'autorità e finalizzato all'acquisizione della *riservatezza* propria della relazione educativa, condizione necessaria per dischiudere la possibilità di interloquire, di interrogare, di mettere per iscritto ciò che si è appreso nel silenzio ed esprimere la propria opinione¹².

L'avvento dei sofisti, a partire dal V secolo, segnerà un passaggio culturale fondamentale nella società ellenica, favorendo il costituirsi della professionalità docente.

Le azioni e le concezioni filosofico-politiche dei sofisti si inseriscono all'interno di un più ampio quadro di cambiamenti politici ed economici che seguirono le vittorie nelle guerre persiane e diedero nuovo vigore al commercio e alle attività produttive. Tutto ciò portò alla formazione di una nuova classe sociale intenta ad acquisire quel potere tradizionalmente riservato all'aristocrazia. In questo contesto gli insegnamenti dei sofisti si caratterizzarono per una specifica finalità volta a trasmettere l'arte della retorica e della persuasione, considerate necessarie nell'azione politica¹³. Innegabile risulta il significato pedagogico dell'insegnamento sofista, che segna una prima importante svolta ideologica nella tradizione occidentale, con notevoli conseguenze sul piano sociale, ritenendo «insegnabile la virtù, cioè la sapienza e l'arte del parlare e del dialogare, a tutti, di qualunque ceto fossero (...). I sofisti diventarono così dei docenti, degli insegnanti con una propria professionalità, una propria tecnica metodologica e didattica, dei contenuti specifici, un curriculum organizzato, e poi rivendicarono il riconoscimento sociale della propria figura professionale tramite la richiesta di un compenso economico per il compito svolto»¹⁴.

Con i sofisti emerge una pratica educativa contraddistinta da finalità intellettuali e modalità professionali, che non si limita all'«esibizione di modelli morali o comportamentali tradizionalmente validi»¹⁵, una vera e propria tecnica razionale da insegnare attraverso l'esercizio di quella che possiamo definire professionalità docente. Un'attenta lettura pedagogica ci consente, dunque, di rinvenire nella cultura filosofica antica le origini del legame tra dimensio-

¹⁰ *Ibid.*, p. 13.

¹¹ *Ibid.*

¹² A. Gellio, *Notti attiche*, IX, 1, Torino, Utet, 1992, p. 171, cit. in Mari, *La relazione educativa*, cit.

¹³ *Ibid.*, p. 14.

¹⁴ M.G. Riva, *Educazione e pedagogia nel mondo antico*, in R. Massa, *Istituzioni di pedagogia e scienze dell'educazione*, Bari, Laterza, 1995, p. 51.

¹⁵ *Ibid.*

ne educativa e professionalità docente, ne sono prova anche le testimonianze scritte relative agli insegnamenti e all'operato del maestro ateniese Socrate, la cui indiscutibile valenza pedagogica interpreta la relazione educativa nei termini della soggettività e della cura di sé.

«A differenza dei colleghi Socrate non mira a rendere il discepolo passivo, ma al contrario lo sollecita a praticare in prima persona la ricerca della verità superando la passiva adesione al sapere altrui (...) Socrate coniuga educazione e personalizzazione nel senso che la singolarità personale è stimolata a manifestarsi con una incisività, la quale anticipa le forme – ben più evidenti – che acquisterà con l'avvento del cristianesimo e della modernità»¹⁶.

Nella relazione educativa messa in campo da Socrate assume un ruolo centrale l'idea di educazione come «pratica di cura»¹⁷ che si costruisce nella forma del dialogo, attraverso la maieutica e l'ironia, due modalità comunicative che mirano a rendere l'interlocutore consapevole di non sapere (ironia) e al contempo capace di far emergere dal proprio animo le idee universali di verità (maieutica) «così come la levatrice riesce a far uscire un bambino dal grembo materno»¹⁸.

Gadamer evidenzia come «una delle grandi intuizioni che troviamo nella presentazione platonica di Socrate è quella secondo cui, all'opposto di ogni opinione comune, il domandare è più difficile del rispondere [...]; chi crede di sapere di più, non è capace di domandare. Per essere capaci di domandare bisogna voler sapere, il che significa però che bisogna sapere di non sapere [...]; viene in luce il carattere preliminare della domanda rispetto ad ogni conoscenza e ad ogni discorso veri. Un discorso che voglia far luce sulla cosa ha bisogno di aprirsi la via nella cosa mediante la domanda»¹⁹.

Nel pensiero di Socrate, dunque, la relazionalità educante, attraverso un nuovo equilibrio di autorità tra i due poli della relazione²⁰, trova il suo *telos* nel condurre il discente verso il raggiungimento personale della conoscenza affinché impari ad aver cura di se stesso.

E nell'Accademia platonica tale assetto pedagogico della relazione maestro-discepolo si articolerà in una vera e propria scuola, in cui confluiranno sapere scientifico e ricerca della verità, animati da interessi etici, politici, metafisici e religiosi²¹. L'Accademia si struttura come spazio di «comunità dove docenti e discenti condividono un'esistenza fatta di studio e vita comune nella quale la scintilla della conoscenza della verità si manifesta senza preavviso, quasi indotta magicamente dalla libera interazione dei fattori in gioco. Questo signi-

¹⁶ *Ibid.*, p. 12.

¹⁷ L. Mortari, *La pratica dell'aver cura*, Milano, Mondadori, 2006, p. 12.

¹⁸ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 52.

¹⁹ H.G. Gadamer, *Verità e metodo*, G. Vattimo (ed.), Milano, Bompiani, 2000, p. 419.

²⁰ S. Mantegazza, G. Seveso, *Pensare la scuola. Contraddizioni e interrogativi tra storia e quotidianità*, Milano, Mondadori, 2006.

²¹ J. Stenzel, *Platone educatore*; trad. it. Bari, Laterza, 1968, cit. in Mari, *La relazione educativa*, cit.

fica, anche per noi oggi, che l'educazione prende forma, poste alcune premesse, in modo non predeterminabile: mira alla conquista della libertà che – ovviamente – non può dipendere da una procedura standardizzata»²².

Nei suoi dialoghi Platone, sulla scia del maestro Socrate, lascia trasparire, come carattere peculiare della relazione educativa, gli elementi della partecipazione e della condivisione, connotandoli di una finalità politica, che ben si accorda con una metodologia dialettico-discorsiva di tipo critico-razionale, analitica e condotta «con formule argomentative da supportare e da sostenere per via deduttiva e dimostrativa, che configurano un agglomerato discorsivo sull'educazione che ne ha costituito la possibilità e la legittimità ad essere trattata teoricamente»²³.

Le riflessioni aristoteliche del V libro dell'opera *Metafisica* e dell'*Etica Nicomachea* costituiscono un contributo significativo per l'analisi storico-pedagogica della relazione educativa: per il filosofo stagirita il processo educativo si attua in una relazione di prossimità, contraddistinta dall'idea di «*koinonia*, comunanza, cioè condivisione profonda, che non ha solo l'effetto di intrattenere oppure dilettere, ma di educare, dunque perfezionare»²⁴.

Nell'*Etica Nicomachea* leggiamo l'assunto secondo cui da coloro che mostrano un'autentica nobiltà è possibile apprendere nobili cose («dai nobili apprendi nobili cose»²⁵), esprimendo il valore pedagogico del processo educativo e la valenza formativa della propria postura relazionale: «l'amicizia con le persone convenienti è conveniente e si perfeziona con il loro frequentarsi. Esse sembrano anzi migliorarsi, esercitando la loro attività e correggendosi a vicenda; esse, infatti, scremano per così dire, l'una dall'altra ciò che a loro piace»²⁶.

Dimensioni insite al fatto educativo oltre che caratteri ideologici del discorso filosofico, le componenti paidetiche esprimono il raggiungimento della conoscenza tramite una metodologia sistematica e razionale in cui «l'attitudine alla teoresi e alla contemplazione propria del pensiero fine a se stesso, del tutto libero dal lavoro manuale, si pongono (...) anche come istanze interne del momento educativo e dei suoi contenuti specifici»²⁷. Nella riflessione aristotelica la relazione educativa implica un'evidente valenza sociologica, sottolineando come i processi di innovazione culturale all'interno di una società rivestano un ruolo di rilievo per cui il benessere individuale deve tenere in considerazione i fattori sociali concernenti il contesto di appartenenza e la collettività²⁸.

²² Mari, *La relazione educativa*, cit., p. 17.

²³ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 55.

²⁴ *Ibid.*, p. 48.

²⁵ Aristotele, *Etica nicomachea*, in *Opere*, Roma-Bari, Laterza, 1969, Vol. VII, cit. in Mari, *La relazione educativa*, cit.

²⁶ *Ibid.*, IX, 12, 1172a 1-15.

²⁷ P. Braidò, *Paideia aristotelica*, Roma, Pas, 1969, p. 58, cit. in Mari, *La relazione educativa*, cit.

²⁸ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 55.

Il modello pedagogico tradizionale romano, connotato dall'enfasi verso la componente gerarchica e severa che definisce una rigida asimmetria relazionale in virtù della quale il docente supervisiona e regola la condotta anche attraverso la punizione fisica, trarrà nuova linfa dall'incontro con la cultura greca che segnerà un cambio di prospettiva pedagogica nel contesto romano, nella direzione di quell'*humanitas* che, da Quintiliano a Cicerone e a Seneca condurrà ad una maggiore attenzione paidetica alla dimensione psicologica del discepolo. Ne conseguirà la valorizzazione della relazione docente-allievo («sempre ma particolarmente ai ragazzi, occorre evitare il rischio di aver a che fare con un maestro arido»²⁹) e degli aspetti comunicativi rispetto alle punizioni corporali, con l'alternanza tra rimproveri, conforti ed elogi, da usare, questi ultimi, in modo equilibrato onde evitare sterili vanterie: «è necessario guidare i ragazzi verso il buon comportamento ricorrendo a consigli e argomentazioni, e non, per Zeus, a pene corporali o maltrattamenti. Infatti, questi metodi appaiono più consoni a schiavi che a uomini liberi»³⁰. Grazie ai principi dell'*humanitas* iniziano a germinare gli ideali che alimenteranno l'umanesimo pedagogico moderno, a partire da una «una concezione del rapporto educativo, come crescita comune a educatore ed educando»³¹, i cui bisogni e necessità legati alla formazione dell'identità, ai tempi del *riposo* e della *fatica* acquisiscono un ruolo centrale nella relazione educativa stessa.

Giuseppe Mari, nella sua ricostruzione storico-pedagogica, descrive il profondo vincolo che con l'avvento del Cristianesimo lega l'ideale educativo alla *storia della salvezza*, in cui la presenza di Dio assume un significato centrale: «è Dio il grande educatore del suo popolo. Il castigo più terribile che potrebbe colpire gli uomini della Bibbia non sarebbe quello di punizioni particolari, ma di sentirsi abbandonati da questa guida amorevole, sapiente, instancabile»³². Si inaugura una *Pedagogia del Lógos*³³, guidata dalla fede, in virtù della quale nella relazione educativa il Pedagogo³⁴ si ispira ai principi di amore e libertà con cui Dio ama e salva il suo popolo, concretizzandone gli assunti e i principi tramite una pratica educativa improntata alla concretezza e alla sobrietà. La dialettica umano-divino trova nella reciprocità e nella libertà della relazione il luogo precipuo di manifestazione del Lógos³⁵ nella sua specifica intenzionalità pedagogica.

²⁹ Quintiliano, *L'istituzione oratoria*, Vol. I, R. Faranda (ed.), Torino, UTET, 1979, p. 232, cit. in Mari, *La relazione educativa*, cit.

³⁰ R. Frasca, *Pseudo-Plutarco: come educare i propri figli*, 12-13, Firenze, La Nuova Italia, 1994, p. 65.

³¹ Mari, *La relazione educativa*, cit., p. 22.

³² C.M. Martini, *Dio educa il suo popolo*, Milano, Centro Ambrosiano, 1987, p. 22.

³³ *Ibid.*, p. 19.

³⁴ D. Tessore, *Clemente Alessandrino. Il pedagogo*, I, 7, Roma, Città Nuova, 2005, cit. in Mari, *La relazione educativa*, cit.

³⁵ *Ibid.*, p.25

Nell'ambito della pedagogia del Cristianesimo un tentativo significativo di conciliare cultura classica e cultura cristiana fu portato avanti da Aurelio Agostino che rimarcò sia le esigenze delle ingenti masse di catechizzandi sia i metodi, la creatività e i sentimenti del maestro, la cui felice combinazione si ritiene utile per l'efficacia dell'educazione, iscritta nel paradigma della religione³⁶.

Nel Medioevo cristiano il connubio tra pensiero religioso e istanze pedagogiche trova in ambiente monastico un fertile terreno dove si sviluppano prassi e principi teorici improntati alla coniugazione, nella relazione educativa, tra severità e dolcezza, magnanimità e rigore, in un percorso di ascesi in cui, attraverso la relazione con l'educatore, l'allievo compie il proprio cammino verso il divino. Nell'ambito dell'educazione monastica prendono forma la scuola certosina, la scuola cistercense e benedettina e la scuola vittorina, dove l'educatore si relaziona «nei tratti di fermezza e dolcezza connotanti colui che ha la responsabilità del gregge a lui affidato, (...) il profilo del buon pastore, paradigma perenne dell'educatore cristiano, che educa perché ama e ama perché educa»³⁷.

L'età medievale si contraddistingue anche per l'istituzione delle scuole Palatine ad opera di Carlo Magno, aventi lo scopo di avviare una riforma educativa in grado di formare «tecnici e funzionari che sostenessero il suo progetto di rinnovamento politico e sociale»³⁸. Si tratta di un modello formativo di tipo laico che rivisita la dimensione relazione dei processi educativi alla luce delle istanze comunicative della parola e del pensiero.

Ed è sempre Giuseppe Mari che ci fornisce una lettura pedagogica efficace del passaggio d'epoca tra età medievale e avvento dell'Umanesimo, inscrivendo i caratteri della relazione educativa in una concezione dell'uomo che ne esalta l'autonomia e la volontà, la cui sintesi non conduce però ad esiti sempre positivi sul piano etico-pedagogico: «l'uomo d'Occidente dal '400 in poi è sempre più scivolato su questa china: ogni valore è stato tratto verso questo teatro di Narciso: la santità, l'eroismo si sono così mutati nella gloria e nel successo, la forza spirituale nel gusto dell'inquietudine, l'amore nell'erotismo, l'intelligenza nell'astuzia, la dialettica nella malizia, la meditazione nell'introspezione, l'amor del vero nelle più ingannevoli sincerità»³⁹.

Con il metodo sperimentale di Galileo Galilei, le deduzioni filosofiche di Cartesio e i procedimenti euristici di Bacone, si assiste ad una reazione da più parti nei confronti della cultura tradizionale, portata avanti attraverso la ricerca di un nuovo modo di concepire la conoscenza⁴⁰, che si esplicita attraverso un nuovo paradigma di conoscenza scientifica che, seppur diversamente decli-

³⁶ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 55.

³⁷ Mari, *La relazione educativa*, cit., p. 56.

³⁸ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 67.

³⁹ E. Mounier, *Il personalismo*, Roma, AVE, 1964, p. 73, cit. in Mari, *La relazione educativa*, cit.

⁴⁰ *Ibid.*, p. 30.

nato, non prescinde dall'osservazione della realtà, da cui scaturisce il metodo sperimentale. L'uomo, al centro di una natura ordinata e leggibile tramite leggi matematiche, si avvale della propria capacità razionale, manifestando l'esigenza di proporre un ideale educativo conforme al nuovo paradigma di indagine scientifica, «di cui il *metodo* è manifestazione in correlazione con l'esposizione analitica e sistematica del procedimento educativo»⁴¹.

Rispetto alle pretese di efficacia proprie del paradigma scientifico del *metodo*, sarà Rousseau a proporre un cambio di prospettiva in antitesi alle istanze della modernità. L'opera *l'Emilio*⁴² pone l'accento sulla soggettività dell'allievo all'interno della relazione educativa, in cui il maestro ha il compito di stimolare le dinamiche di apprendimento attraverso l'invito all'osservazione della natura al fine di incrementare la curiosità del discente, la capacità di risolvere quesiti e di apprezzare la conoscenza: «rendete il vostro allievo attento ai fenomeni della natura, e ben presto lo renderete curioso; ma per alimentare la sua curiosità, non vi affrettate mai per soddisfarla. Proponetegli quesiti adatti alla sua mente e lasciateglieli risolvere. (...) Emilio ha poche cognizioni, ma quelle che ha sono veramente sue. (...) Il mio scopo non è di dargli la scienza ma di insegnargli ad acquistarla al bisogno, di fargliela apprezzare esattamente per quello che vale»⁴³. Nell'ottica roussoniana la valenza educativa della relazione docente-discente si dipana nel momento esperienziale più che sul mero piano della comunicazione, propendendo per una pratica educativa individualizzata e lontana dalla meccanica replicazione del metodo propria del clima culturale del suo tempo.

La temperie culturale dell'Ottocento registra un notevole avvicinamento dello sguardo pedagogico alla riflessione filosofica, determinando una sorta di trascrizione epistemologica della prima nella seconda⁴⁴. Sul versante teorico è notevole l'enfasi data al ruolo e alla funzione delle emozioni, dei sentimenti e dell'amore nella relazione educativa⁴⁵: «O maestro, (...) rassicura nei tuoi confronti il cuore del tuo bambino, renditi indispensabile a lui, egli non abbia compagno più gradevole, più allegro, che egli scelga con maggiore gioia per le sue ore di gioco di te. (...) Lascialo godere appieno della sua libertà, ma accompagnalo con un'attività delle più gradevoli e più interessanti per il bambino stesso; osserva attentamente e non caricarlo troppo e dà il via al lavoro ed alla gioia»⁴⁶; sul piano pratico, tuttavia, il modello educativo scolastico di stampo ottocentesco propende per un'impostazione basata sul controllo della disciplina tramite premi e punizioni. Si dovrà attendere la fine del secolo perché la relazione educativa sul campo riconosca motivazioni pedagogiche e metodi

⁴¹ *Ibid.*, p. 24.

⁴² J.J. Rousseau, *Emilio*, trad. it., Firenze, La Nuova Italia, 1964.

⁴³ *Ibid.*, pp. 101-125.

⁴⁴ Riva, *Educazione e pedagogia nel mondo antico*, cit.

⁴⁵ Mari, *La relazione educativa*, cit.

⁴⁶ J. Pestalozzi, *Diario Sull'educazione del figlio*, in E. Becchi, *Scritti scelti*, Torino, UTET, 1970, pp. 68-71.

relazionali provenienti dall'autentico «riconoscimento della dignità personale dell'alunno»⁴⁷, aprendo le porte alle nuove consapevolezze e prospettive pedagogiche del secolo successivo.

Il XX secolo si apre in Italia con la voce di Giovanni Gentile che si inserisce un clima pedagogico contraddistinto da una sempre maggiore centralità del discente nella relazione educativa attraverso la conoscenza personale e l'accoglienza dei suoi bisogni e interessi⁴⁸. Per Gentile l'agire educativo deve muoversi nella direzione della valorizzazione della dimensione spirituale insita nella relazione educativa: «l'educatore educando si fa educatore: e questa è opera spirituale; l'educando, profittando dell'educazione si fa educando. La spiritualità dei termini educativi, dunque, è incontestabile»⁴⁹. La rilevanza pedagogica dell'approccio gentiliano si iscrive nei termini di una riflessione teoretica capace di sottrarre la relazione educativa a quell'approccio di stampo positivistico che la configurava come procedura, protocollo e metodo: la prospettiva gentiliana di filosofia dell'educazione legge nello spirito la formazione, l'educazione e lo svolgimento dello spirito stesso, al punto che «la filosofia stessa (...) diventa Pedagogia e la forma dei singoli problemi pedagogici diventa la filosofia»⁵⁰.

La pedagogia cattolica di Mario Casotti, allievo di Giovanni Gentile, rappresenta una sorta di superamento critico del pensiero del maestro, pur restando nell'ambito della visione spiritualista: la ripresa del tomismo, grazie anche alla Lettera Enciclica *Aeterni Patris* (1879) di Leone XIII, da parte della pedagogia cattolica intende valorizzare «la materialità del rapporto educativo come espressione spirituale»⁵¹. Nella relazione educativa tale materialità fa riferimento all'attenzione verso le caratteristiche individuali, alla comunione profonda tra docente e discente, alla consapevolezza della libertà e singolarità di ognuno⁵², che si mantengono vive nell'esperienza comunicativo-relazionale maestro-scolaro. La risposta di Casotti alla prospettiva gentiliana tocca punti ancora oggi di grande rilevanza nella riflessione sulla relazione educativa, dall'importanza della dimensione contestuale alla necessità, da parte del maestro, di leggere e interpretare il linguaggio non verbale dei propri alunni, in quanto «mediante essi si esprime l'atteggiamento degli scolari innanzi alla lezione: la noia o l'ansia, il tedio o la curiosità, il sollievo o la fatica, e via dicendo»⁵³. Una preoccupazione del maestro, dunque, deve essere volta

⁴⁷ Mari, *La relazione educativa*, cit., p. 34.

⁴⁸ *Ibid.*

⁴⁹ G. Gentile, *Sommario di pedagogia come scienza filosofica Vol. I. Pedagogia generale*, Firenze, Sansoni, 1954 [1913], p. 126.

⁵⁰ Id., *Sommario di pedagogia come scienza filosofica Vol. II, Didattica*, Bari, Laterza, 1914, p. 15.

⁵¹ Mari, *La relazione educativa*, cit., p. 34.

⁵² *Ibid.*, p. 86.

⁵³ M. Casotti, *Maestro e scolaro*, Brescia, La Scuola, 1952, pp. 181-185, cit. G. Mari, *La relazione educativa*, cit.

all'indagine dello stato d'animo degli alunni nel corso della lezione, avendo coscienza del mondo materiale che lo circonda per cogliere gli indizi «che gli servono mirabilmente ad accorgersi se il suo uditorio è attento o disattento, appassionato o freddo, incuriosito o annoiato»⁵⁴.

Ispirato allo spiritualismo gentiliano è lo sguardo pedagogico di Giuseppe Lombardo Radice che attinge ad alcuni aspetti del metodo e della didattica delle Scuole Nuove rileggendo la spontaneità e la creatività come elementi possibili solo in «una scuola densa di forze e di energie vitali, viste come manifestazioni dello Spirito»⁵⁵.

La relazionalità educante viene letta da John Dewey, padre dell'attivismo pedagogico d'oltreoceano, conferendo centralità alle finalità sociali dell'azione educativa, al ruolo dell'ambiente e agli aspetti logico-psicologici che si attivano nel processo di apprendimento. Il fatto educativo così inteso si articola come processo dinamico e aperto nei confronti dei mutamenti sociali, da ciò la necessità di dare priorità al metodo che diventa fine in se stesso nella misura in cui riflette il modo di concepire l'individuo e la sua posizione nella comunità di cui è parte. Pertanto, dalle modalità adottate nel processo di insegnamento/apprendimento è possibile desumere come è intesa l'educazione in una determinata società e la natura stessa dei rapporti sociali⁵⁶.

La modernità dell'impostazione deweyana è rimarcata da Alain Goussot secondo cui «basta leggere queste righe del testo *Democrazia e educazione* per rendersi conto della forza attuale dell'approccio di Dewey e della sua fede nel progresso umano attraverso l'educazione: la vita è sviluppo, e che svilupparsi, crescere è vita. (...) Il processo educativo è processo di continua riorganizzazione, ricostruzione, trasformazione. L'inclinazione a imparare dalla vita stessa e a rendere le condizioni del vivere tali che ognuno sia in grado di imparare nel corso stesso del vivere è il più bel prodotto della scuola»⁵⁷.

La concezione della relazione educativa che si legge nelle opere del pensatore personalista Jacques Maritain possiede nell'idea di libertà «come sostanza della persona»⁵⁸ un elemento comune ai principi deweyani, pur iscrivendosi all'interno di una cornice concettuale metafisica. La relazione educativa è vista dal personalista francese come dinamica, basata sull'autorevolezza del maestro e collocata su due livelli, quello dell'autorità *intellettuale* per insegnare e quello dell'autorità *morale* per ottenere il rispetto, relazione che necessita dell'amore⁵⁹ inteso come una profonda ispirazione comunicativa. Tale idea di autorità rimanda alla nostra concezione di autorevolezza educativa, che sta

⁵⁴ *Ibid.*

⁵⁵ Riva, *Educazione e pedagogia nel mondo antico*, cit., p. 166.

⁵⁶ A. Goussot, *Dewey oggi: la pedagogia impossibile e l'utopia dell'educazione democratica*, «Educazione Democratica», a. III, n. 5, gennaio 2013, p. 26.

⁵⁷ *Ibid.*, p. 16.

⁵⁸ Mari, *La relazione educativa*, cit., p. 34.

⁵⁹ *Ibid.*, p. 159.

alla base dell'analisi della relazione educativa messa in opera. Autorità diviene autorevolezza educativa, infatti, quando «si manifesta come capacità di sostegno attraverso la pratica della cura, la disponibilità al dialogo, l'azione donativa, la testimonianza di una proposta. La radice della parola autorità si trova nell'espressione latina *augere* che significa far crescere»⁶⁰.

Nell'opera *Per una filosofia dell'educazione* (1959) Maritain si oppone al paternalismo e all'imperialismo degli adulti che tentano di «imprimere la propria immagine sul fanciullo come su di un pezzo di argilla»⁶¹. L'autorità autentica si distingue dal potere arbitrario e trova nell'amore la *condicio sine qua non* della relazione educativa docente-discente, nella quale quest'ultimo ha diritto di aspettarsi dal primo ciò di cui ha bisogno, «ossia di essere guidato positivamente e di imparare ciò che lui ignora. Quali sono, nell'opera educativa, i doveri essenziali degli adulti di fronte alla gioventù? Innanzi tutto, debbono stare attenti a ciò che corrisponde al fine primario dell'educazione, ossia la verità da conoscere ai diversi gradi della scala del sapere, e la capacità di pensare e di giudizio personale da sviluppare, rinvigorire e stabilire fermamente; in seguito, debbono prendersi cura di ciò che corrisponde ai fini secondari dell'educazione, in particolare di assicurare la trasmissione dell'eredità di una data cultura»⁶².

A partire dalle riflessioni e dai ripensamenti critici in merito all'attivismo emersi nel secondo dopoguerra si assiste ad una riconsiderazione della disciplina scolastica messa in atto in misura proporzionale rispetto agli apprendimenti, che confluirà nella diffusione tra gli anni '70 e gli anni '80 nelle didattiche disciplinari le quali, pur recando benefici ai processi di insegnamento/apprendimento, risulteranno insufficienti a dotare di significato educativo la relazione didattica.

Il secolo scorso si è chiuso con una forte accentuazione della tecnica e del suo ruolo nel contesto educativo scolastico, facendo registrare alle soglie del XXI secolo una rinnovata esigenza di umanesimo in particolar modo da parte della riflessione pedagogica che investe la relazione educativa intesa come *luogo* in cui si genera la dinamica dell'umanizzazione⁶³. Le incertezze della società contemporanea, esito multiforme di una paideia attraversata da dicotomie profonde tra persona e tecnica, natura e cultura, mezzi e fini, sono chiaramente espresse dai diversi paradigmi filosofici che leggono la complessità socio-culturale del presente tra umanesimo e nichilismo, progresso tecnologico e bagaglio storico-culturale, razionalità tecnica e domande di senso. In questo

⁶⁰ G. Chiosso, *I significati dell'educazione. Teorie pedagogiche e della formazione contemporanea*, Milano, Mondadori, 2009, p. 7.

⁶¹ J. Maritain, *Per una filosofia dell'educazione*, G. Galeazzi (ed.), Brescia, La Scuola, 2001, pp. 238-239.

⁶² *Ibid.*

⁶³ Mari, *La relazione educativa*, cit., p. 36.

clima culturale la progettazione formativa non può tralasciare la questione della 'persona' che deve tornare ad essere fine e non mezzo, capace di «essere io senza possedere un sé, se non come possibilità, come virtualità quindi ricollocato nella dimensione della possibilità e dell'attesa»⁶⁴.

Se la dimensione tecnoscientifica rischia di dominare l'orizzonte culturale del nuovo millennio, il paradigma della pedagogia generativa⁶⁵ consente di progettare percorsi formativi che restituiscano all'uomo la possibilità «di pensarsi umano»⁶⁶ e di costruire il senso autentico del proprio essere e del proprio agire.

Le brevi note relative ad una sintetica ricostruzione dei caratteri della relazione educativa attraverso i secoli nella storia dell'Occidente hanno condotto ad una riflessione sul processo storico-culturale che ha condotto alla definizione delle caratteristiche e delle specifiche componenti della relazione educativa nel corso del tempo, le cui peculiarità ancora oggi la delincono e la sostanziano di significato pedagogico. Alla luce della complessità ermeneutica, storico-sociale e pedagogica della storia della relazione educativa, questo contributo non detiene alcun carattere di esaustività, volendo proporsi come parziale e al contempo necessaria introduzione all'analisi della relazione educativa in ottica generativa.

Muovendo da queste premesse emerge lo studio sulla relazione educativa attraverso l'ipotesi del modello Relation Oriented⁶⁷. Si tratta di un modello che si articola sulla base di una stretta interconnessione tra teoria e prassi pedagogica, tra quadro teorico e quadro situazionale, tale bidimensionalità consente da una parte di intercettare le componenti epistemologiche ed ermeneutiche della relazione educativa, e dall'altra di attivare specifiche prassi educative in rapporto ad un determinato contesto. Tale struttura che integra teoria e prassi è alla base della dinamicità del Modello tra intenzionalità pedagogica e progettazione educativa. Il focus del modello Relation Oriented si articola intorno alla gestione della relazione educativa attraverso la formazione di specifiche competenze da parte della professionalità docente, che sono elaborate tramite una configurazione di tipo piramidale. Alla base vi sono le competenze comunicative di base possedute dal docente (la comunicazione descrittiva o constattiva, la comunicazione espressiva o rappresentativa, la

⁶⁴ F. Cambi, *Manuale di filosofia dell'educazione*, Roma, Laterza, 2000, p. 177.

⁶⁵ Cfr. E. Mannese, *Saggio breve per le nuove sfide educative*, Lecce, Pensa MultiMedia, 2016; Ead., *L'Orientamento Efficace. Per una Pedagogia del lavoro e delle organizzazioni*, Milano, FrancoAngeli, 2019; Ead., *Presentazione. Special Issue Pedagogia e Politica. Costruire Comunità Pensanti*, «Attualità Pedagogiche», vol. 3, n.1, 2021, pp. 1-2; Ead., *Manuale di Pedagogia Generativa e Sistema-Mondo. Epistemologie e Comunità Pensanti per l'Homo Generativus*, Lecce, Pensa MultiMedia, 2023.

⁶⁶ M.G. Lombardi, *Le povertà educative: una sfida pedagogica per le Comunità Pensanti*, «Attualità Pedagogiche», vol. 6, n. 1, 2024, p. 5.

⁶⁷ D. Bellantoni, M.G. Lombardi, *Relazione educativa e professionalità docente. Linee guida per l'autoformazione e l'empowerment*, Milano, FrancoAngeli, 2020.

comunicazione regolativa o di feedback, l'ascolto empatico o 'attivo', il dialogo socratico o *ars maieutica*) che si inscrivono in un rapporto di circolarità con gli aspetti relazionali e gruppal⁶⁸, al centro le competenze relation oriented (io-comportamento, motivazione-autostima-apprendimento) che «rappresentano lo svincolo necessario al raggiungimento e al consolidamento delle abilità connesse agli apprendimenti scolastici significativi»⁶⁹, mentre al vertice sono poste le competenze task oriented connesse alle specifiche abilità orientate al compito (personalità scolastica, ambiente scolastico, teorie sull'apprendimento)⁷⁰.

Il principio teorico che fonda il modello Relation Oriented si esplicita nella conformazione piramidale in base alla quale le competenze task oriented sono raggiungibili grazie all'adozione delle competenze comunicative di base da cui la relazione educativa trae le premesse necessarie per mettere in campo le competenze relation oriented; queste ultime vengono agite a partire dall'asimmetria relazionale propria della relazionalità educante che forma nell'intenzionalità pedagogica e nella responsabilità educativa la specifica funzione pedagogica⁷¹.

La storia della relazione educativa si arricchisce del costrutto di «generatività educativa che non indica una particolare predisposizione della personalità, quanto piuttosto una competenza relazionale che per essere agita in una relazione ha bisogno di essere definita, individuata ed esercitata. Generatività educativa è nella capacità di prendersi cura del percorso educativo dell'altro attivando un insieme complesso e dinamico di conoscenze, abilità, processi, ma anche procedure metodologiche fondate sulla ricorsività teoria-prassi della pedagogia evidenziando nella gestione della relazione educativa la competenza cardine intorno alla quale si muovono ulteriori competenze»⁷².

Una ricorsività teoria-prassi che la pedagogia generativa esplicita attraverso l'applicazione del Protocollo metodologico di Orientamento Generativo e dei Sistemi Organizzativi (Protocollo O.Ge.S.O.). Si tratta di un'articolazione operativa dei principi della *Generatività Pedagogica* e del Sistema-Mondo, concepito per mettere in campo pratiche educative di orientamento generativo e per consentire la realizzazione e il miglioramento di sistemi organizzativi efficaci ed autopoietici. Questo Protocollo rappresenta una metodologia dinamica e adattiva per creare contesti di conoscenza e ambienti di apprendimento trasformativi. L'obiettivo è quello di allestire contesti di conoscenza e ambienti di apprendimento in cui si attivano processi di scoperta personale e collettiva che interagiscono profondamente con le dimensioni inconsce, nutrendo le potenzialità latenti di ogni soggetto, permettendo così l'espansione delle ca-

⁶⁸ *Ibid.*, p. 52.

⁶⁹ *Ibid.*, p. 41.

⁷⁰ *Ibid.*, pp. 37-38.

⁷¹ *Ibid.*, p. 40.

⁷² Lombardi, *La formazione degli insegnanti in prospettiva generativa*, cit., p. 7.

pacità creative e del pensiero critico necessari per la costruzione intenzionale del progetto di vita⁷³. Ed è in questa prospettiva epistemologica che si iscrive l'ipotesi di una letteratura per l'infanzia in ottica generativa.

2. *La letteratura per l'infanzia tra funzione letteraria e funzione generativa*

Il lemma che costituisce la seconda parte della pista metodologica di questo contributo è certamente il costrutto di Generatività che ha assunto, negli ultimi anni, un ruolo centrale nella riflessione pedagogica. La nascita e l'evoluzione del concetto di Generatività, le sue declinazioni storiche e filosofiche, i diversi campi di applicazione, la trasversalità e l'integrazione dei modelli disciplinari, connessi alla varietà di approcci ed interpretazioni costituiscono i fondamenti epistemologici della *Pedagogia Generativa*⁷⁴.

Quando Emiliana Mannese ricostruisce le origini del concetto evidenzia la nascita della terminologia ad opera dello psicologo Erik Erikson⁷⁵ (1959) che nell'elaborazione della teoria dello sviluppo psicosociale, con specifico riferimento all'adulthood, introduce il concetto di «crisi di Generatività» per indicare quello stadio dello sviluppo che ciascun essere umano incontra caratterizzato dalla preoccupazione per le future generazioni e dalla volontà di contribuire alla società.

In ambito pedagogico nel contesto contemporaneo un riferimento essenziale va alle ricerche condotte da Margiotta⁷⁶ (2014) e Costa (2016)⁷⁷ che hanno posto l'accento sulla costruzione dinamica del concetto nei contesti di formazione.

Sono certamente i fondamenti rintracciabili nelle opere di Husserl, Merleau-Ponty e Deleuze a rappresentare una tappa fondamentale per l'ipotesi interpretativa qui elaborata di una letteratura per l'infanzia in ottica generativa.

Steinbock (2003) sottolinea come il lavoro di Husserl vada oltre l'analisi statica dell'esistenza sociale per investire una dimensione di Generatività, intesa come il processo di divenire storico e sociale che si sviluppa attraverso le generazioni. Questa prospettiva è in linea con le teorie di Maturana, Varela e Thompson, secondo i quali la fenomenologia generativa si concentra sul divenire storico ed intersoggettivo dell'esperienza umana,

⁷³ Mannese, *Manuale di Pedagogia Generativa e Sistema-Mondo. Epistemologie e Comunità Pensanti per l'Homo Generativus*, cit., pp. 223-224.

⁷⁴ *Ibid.*, p. 23.

⁷⁵ E.H. Erikson, *Identity and the Life Cycle*, Madison, International Universities Press, 1959.

⁷⁶ U. Margiotta, *La trama enattiva della relazione educativa: formatività e genitorialità*, Venezia, Università Ca' Foscari, 2014.

⁷⁷ M. Costa, *L'apprendimento permanente come leva generativa per un nuovo learnfare*, «Formazione & Insegnamento», n. 2, 2016, pp. 63-78.

evidenziando l'importanza dell'intersoggettività e dell'incorporamento culturale. Steinbock affronta anche i temi dell'identità e della differenza in relazione alla vita sociale, considerando le dimensioni generative normative, intersoggettive, geologiche e storiche. Husserl si interessa alle interconnessioni tra il familiare e lo straniero, sottolineando che non siamo una comunità di monadi sincroniche, ma entità geostoriche e sociali significative. La fenomenologia generativa partecipa, quindi, allo sviluppo delle strutture dell'esistenza e della coesistenza, andando oltre la coscienza individuale e fondando il sociale. Husserl considera la Generatività come risposta ad una crisi culturale, segnando un passaggio dalla fenomenologia genetica a quella generativa, che affronta la profonda temporalità e l'interscambio culturale, integrando storicità e generazioni all'interno di un contesto intersoggettivo⁷⁸.

Saranno poi gli studi di Miettinen (2015)⁷⁹ a far mergere una forte interconnessione tra fenomenologia, etica neoliberista e poiesi mettendo al centro la capacità dell'essere umano, quale organismo poietico di generare nuovi significati e oggetti culturali attraverso l'assimilazione, l'imitazione e la trasformazione critica della tradizione⁸⁰.

La caratteristica della generatività pedagogica è nella transdisciplinarietà⁸¹ che, nella sua triplice articolazione – epistemologico-linguistica, applicativa e generativa – diventa quello spazio di frontiera delle discipline, «quel luogo senza-luogo nel quale i problemi fondamentali dell'uomo e della vita trovano il giusto posto»⁸².

In questo spazio di frontiera che abbatte i confini delle discipline di particolare interesse sono gli studi di impianto biologico di Affifi (2015)⁸³ che metteranno in luce la necessità di leggere in maniera intersoggettiva sia la cultura che la storia: anche la biologia infatti è interpretata come storica in un senso fenomenologico poiché essa ci insegna che l'ambiente di un organismo è influenzato dalla storia attraverso il tempo.

L'ambiente Umano influenzato dalla storia attraverso il tempo ritrova nella lettura quello spazio di *Cura di sé* in grado di dare forma ai nostri pensieri, generando, come scrive Cambi⁸⁴ la sospensione dal vissuto, l'entrata in un mondo-Altro capace di attivare la potenza evocatrice della parola entrando dentro la storia.

⁷⁸ Mannese, *Manuale di Pedagogia Generativa e Sistema-Mondo. Epistemologie e Comunità Pensanti per l'Homo Generativus*, cit., p. 24.

⁷⁹ T. Miettinen, *Husserl's Phenomenology of Poiesis: Philosophy as Production*, «The Journal of Speculative Philosophy», vol. 29, n. 3, 2015, pp. 356-365.

⁸⁰ Mannese, *Manuale di Pedagogia Generativa e Sistema-Mondo. Epistemologie e Comunità Pensanti per l'Homo Generativus*, cit., p. 25.

⁸¹ Facciamo qui riferimento alla *Carta della Transdisciplinarietà*, redatta da Basarab Nicolescu, Edgar Morin e Lima De Freitas e firmata ad Arrábida in Portogallo il 6 novembre del 1994.

⁸² E. Bambara (ed.), *Il manifesto della transdisciplinarietà*, Messina, Armando Siciliano Editore, 2014, p. 9.

⁸³ R. Affifi, *Generativity in biology*, «Phenomenology and the Cognitive Sciences», vol. 14, n. 1, 2015, pp. 149-162.

⁸⁴ F. Cambi, *La Cura di sé come processo formativo*, Bari, Laterza, 2010, pp. 56-57.

È in questa dimensione che si colloca la funzione generativa della letteratura per l'infanzia che diventa strumento⁸⁵ nella relazione educativa quando attiva un processo di Co-costruzione, in senso evolutivo e dinamico, di processi complessi di conoscenza attraverso cui il soggetto pensa l'esperienza proiettandosi nei non-luoghi della latenza pedagogica attraverso il Pensiero.

Emblematica risulta essere la lettura dell'Albo illustrato di Antoinette Portis, *Non è una scatola*, Kalandraka, Firenze, 2011⁸⁶, in cui la funzione generativa non sta tanto nel gioco simbolico che apre all'esperienza di nuovi significati, quanto piuttosto nella specifica e soggettiva funzione di senso e di significato che, attraverso la relazione educativa, ciascun bambino co-costruisce a partire dai non-luoghi della latenza pedagogica.

Il teologo John Dunne⁸⁷ ha descritto con il termine *passing over*, letteralmente *passare oltre*, il processo attraverso cui la lettura ci consente di sperimentare la prospettiva dell'altro da sé, la possibilità di identificarci, seppur temporaneamente, con l'altro da sé, con la sua coscienza.

La funzione generativa della letteratura per l'infanzia nella relazione educativa consente quindi attraverso i processi di *passing over* di sperimentare immaginare e guardare ai non-luoghi della latenza pedagogica come spazi di vita attraverso i quali co-costruire processi di conoscenza. La latenza pedagogica è infatti «il fondamento su cui si costruisce l'apprendimento autentico e significativo. Gli elementi latenti del processo educativo, di tipo cognitivo, affettivo e relazionale, rappresentano i 'mattoni' invisibili che sostengono l'edificio dell'educazione. Questi elementi, benché non immediatamente evidenti, costituiscono le basi su cui si sviluppa la personalità di chi apprende e si realizza il suo progetto di vita»⁸⁸.

La letteratura per l'infanzia in ottica generativa sottolinea l'interconnessione costante, in chiave transdisciplinare dinamica, tra la lettura e la costruzione dei processi di conoscenza in pensiero.

Se Bruner sottolineava la capacità della lettura di «oltrepassare l'informazione data»⁸⁹, la generatività pedagogica ci permette, oggi, di rafforzare l'ipotesi di Bruner non solo in chiave pedagogica ma anche biologica e neuroscien-

⁸⁵ Il termine strumento viene qui inteso in senso figurato, ovvero il mezzo attraverso cui nella relazione educativa è possibile attivare il dispositivo generativo di co-costruzione in senso evolutivo e dinamico, di processi complessi di conoscenza attraverso cui il soggetto pensa l'esperienza proiettandosi nei non-luoghi della latenza pedagogica attraverso il Pensiero.

⁸⁶ A. Portis, *Non è una scatola*, Firenze, Kalandraka, 2011.

⁸⁷ J. Dunne, *Love's mind: An Essay on Contemplative Life*, Notre Dame, University of Notre Dame Press, 1993.

⁸⁸ Mannese, *Manuale di Pedagogia Generativa e Sistema-Mondo. Epistemologie e Comunità Pensanti per l'Homo Generativus*, cit., p. 141.

⁸⁹ J. Bruner, *Beyond the information given, Studies in the Psychology of Knowing*, New York, W.W. Norton & Company, 1973.

tifica. E se è vero come sottolineano le ricerche di Darnton⁹⁰ che i cambiamenti tra il lettore ed il testo costituiscono degli indicatori della storia e del pensiero, se è vero che la cultura ed in primis la lettura trasformano costantemente il nostro cervello, aver cura della lettura, sin dall'infanzia, significa prendersi cura del pensiero.

Nel 1950 Elizabeth Bowen scriveva: «sono sicura che se potessi leggere all'indietro, analiticamente, nei libri della mia infanzia, troverei gli indizi di tutto. Il bambino vive nel libro; ma non più di quanto il libro vive nel bambino»⁹¹.

Tale consapevolezza pedagogica trova riscontro all'interno della parabola diacronica della ricostruzione delle vicende storico-culturali, sociali ed editoriali della letteratura per l'infanzia, di cui si delinearono brevemente alcuni passaggi essenziali senza alcuna pretesa di esaustività, la cui genesi, tra Settecento e Ottocento è riconducibile al diffondersi delle idee illuministe e ad una visione dell'infanzia che iniziava a riconoscere la personalità del bambino⁹², basti pensare alle opere dal messaggio profondamente innovativo di Jean Jacques Rousseau. Tuttavia, nel corso del Settecento il clima illuminista opererà per una letteratura con obiettivi squisitamente educativi e moralistici, sarà l'Ottocento con l'evolversi della nuova sensibilità propria del Romanticismo ad esaltare la fantasia, il sentimento religioso e il patriottismo, favorendo lo sviluppo di un romanzo per ragazzi che veicolava valori etici e civili in sintonia con l'ideale pedagogico del periodo⁹³. Se nella prima parte del secolo il mondo del bambino nelle opere letterarie è dipinto con toni delicati ed edulcorati, con l'affermarsi del positivismo naturalista si inizia a prediligere l'immagine di un'infanzia sventurata, abbandonata e vilipesa, basti pensare al *Piccolo Lord* di Frances H. Burnett o ad *Heidi* di Johanna Spyri⁹⁴. Il nesso tra letteratura per l'infanzia e criteri educativi ispirati ai principi pedagogici liberali venne chiaramente esplicitato dalla fondazione nel 1836 da parte di Raffaello Lambruschini, sacerdote e pedagogo genovese, della rivista *Guida dell'educatore* nata intorno al Gabinetto scientifico e letterario di Viesseux⁹⁵, di cui facevano parte Gino Capponi, Bettino Ricasoli e Niccolò Tommaseo. Il passaggio culturale dalla poetica romantica e dagli ideali risorgimentali al prevalere delle istanze del positivismo e del verismo permea gli albori letterari dell'Italia post-unitaria, trovando nel capolavoro di Carlo Collodi, *Le avventure di Pinocchio* (1883), un originale e riuscito connubio tra intenti educativi e divertimento,

⁹⁰ R. Darnton, *A history of Reading*, «Australian Journal of French studies», vol. 23, n. 1, 1986, pp. 5-30.

⁹¹ E. Bowen, *Out of a book*, in *Collected Impression*, New York, Knopf, 1950, p. 267.

⁹² A. Nobile, D. Giancane, C. Marini, *Letteratura per l'infanzia e l'adolescenza*, Brescia, Scholè, 2022, p. 37.

⁹³ *Ibid.*, p. 45.

⁹⁴ *Ibid.*, p. 50.

⁹⁵ R. Lambruschini, *Guida dell'educatore*, Viesseux, 1836.

tra fantasia e senso del reale⁹⁶. Contemporaneo del burattino collodiano e indiscusso protagonista dell'ultimo scorcio del XIX secolo e sicuramente della prima parte del secolo successivo, il romanzo *Cuore* di Edmondo De Amicis (1886) si colloca nella cornice di una pedagogia della sofferenza la cui ideologia educativa, come affermato da Franco Cambi, vede un'infanzia segnata dagli influssi sociali dell'ambito familiare, dell'istituzione scolastica, della patria e della società⁹⁷. Con il Novecento si assiste al progressivo riconoscimento della singolarità del bambino e al suo diritto di svilupparsi come persona, assunti riconosciuti e promossi dalla pedagogia scientifica di Maria Montessori e dal movimento delle scuole nuove, a partire dall'idea di centralità del fanciullo rispetto all'adulto all'interno delle prassi educative. Sulla scorta di tale cambio di rotta la letteratura per l'infanzia avvia un'opera di rinnovamento dei contenuti e dello stile. Oggetto di diverse riflessioni sulla sua epistemologia e sulle sue finalità, il libro per ragazzi, in quanto opera d'arte letteraria nell'ambito della letteratura per l'infanzia, verrà definito da Giuseppe Lombardo Radice come «ciò che può essere gustato, senza restrizioni e riserve anche dagli adulti» perché «tutto ciò che vale per i bambini se vale anche per gli adulti allora è opera d'arte»⁹⁸. Negli anni immediatamente successivi Giovanni Maria Bertin identifica la forza attrattiva della letteratura per l'infanzia nella sua capacità di condurre il giovane lettore in «un mondo straordinario, un mondo del tutto opposto al mondo ordinario»⁹⁹. Espressione e produzione di una nuova coscienza pedagogica nei confronti dei bisogni e dei diritti dell'infanzia, gli anni Sessanta del secolo scorso in Italia registrano una sorta di cesura rispetto alla letteratura precedente dalle finalità volutamente didascaliche, con la diffusione, a partire da Gianni Rodari, di storie scritte al solo scopo di divertire la gioventù e metterla in contatto con il mondo delle emozioni e con la realtà che le suscita¹⁰⁰. L'azione innovatrice di Rodari risponde alle esigenze di rinnovamento dei pedagogisti progressisti in un periodo storico in cui alle grandi contestazioni corrispondono grandi contraddizioni come quelle della scuola di quegli anni¹⁰¹; «maestri di frontiera» come don Milani, Ciari e Lodi si oppongono al modello autoritario della scuola tradizionale accusato di mortificare la fantasia e la libertà di iniziativa, con l'obiettivo e l'ideale pedagogico non solo di parlare del bambino ma di dargli la parola¹⁰². Il confronto con studiosi

⁹⁶ Nobile, Giancane, Marini, *Letteratura per l'infanzia e l'adolescenza*, cit., pp. 53-54.

⁹⁷ Cfr. F. Cambi, *Collodi, De Amicis, Rodari*, Bari, Dedalo, 1977, pp. 98-104.

⁹⁸ G. Lombardo Radice, *Lezioni di didattica*, Palermo, Sandron, 1950, p. 217, in Nobile, Giancane, Marini, *Letteratura per l'infanzia e l'adolescenza*, cit.

⁹⁹ G.M. Bertin, *Stampa, spettacolo, educazione*, Milano, Marzorati, 1956, p. 15.

¹⁰⁰ E. Catarsi, F. Bacchetti (edd.), *I Tusitala. Scrittori italiani contemporanei di letteratura giovanile*, Tirrenia (Pisa), Edizioni Del Cerro, 2006, p. 17, in Nobile, Giancane, Marini, *Letteratura per l'infanzia e l'adolescenza*, cit.

¹⁰¹ M.T. Trisciuzzi (ed.), *Frontiere. Nuovi orizzonti della letteratura per l'infanzia*, Pisa, Edizioni ETS, p. 91.

¹⁰² Nobile, Giancane, Marini, *Letteratura per l'infanzia e l'adolescenza*, cit., p. 109.

e intellettuali del suo tempo porta Rodari all'incontro con Malaguzzi e alla condivisione dell'idea pedagogica che «la fantasia fa parte di noi come la ragione, ed esplorarla è un modo per guardare dentro noi stessi. La fantasia dei bambini, inoltre, è ancora più capace di quella degli adulti di scavalcare le banalità e di creare nuovi mondi e nuove avventure»¹⁰³. La grande modernità del pensiero di Rodari, le cui opere continuano ad affascinare grandi e piccoli, sta nella convinzione, sottesa a tutta la sua produzione letteraria, che l'elemento fondamentale della letteratura per l'infanzia sia l'incontro con i bambini, con il loro mondo e le loro esperienze attraverso la relazione, il gioco, l'osservazione profonda dei loro vissuti e delle loro emozioni¹⁰⁴, da cui si dischiudono inedite opportunità di scoperta, di immaginazione, di vita. In questa missione educativa l'artista e il pedagogo si incontrano nell'espressione artistica, veicolo privilegiato che stimola la fantasia, quella fantasia a cui la pedagogia generativa, in totale sintonia con il maestro di Omegna, riconosce la capacità formativa di «aprire mondi»¹⁰⁵ e di generare consapevolezza autentica di sé e del mondo.

Il paradigma della generatività pedagogica ci consente di mettere in campo un approccio transdisciplinare capace di interconnettere il costruito della relazione educativa, il processo di lettura che in essa acquisisce significati di apprendimento profondo, e la letteratura per l'infanzia che sin dalle più antiche forme del mito e della fiaba si presenta al lettore come 'luogo' di incontro.

In questo spazio generativo, l'esterno del mondo, gli eventi epigenetici, grazie alla mediazione letteraria incontrano l'interno, i vissuti del giovane lettore, contribuendo a dare forma ai non-luoghi della latenza pedagogica attraverso il Pensiero.

¹⁰³ G. Rodari, *Parole per giocare*, Firenze, Manzuoli, 1974, p. 6.

¹⁰⁴ Trisciuzzi (ed.), *Frontiere. Nuovi orizzonti della letteratura per l'infanzia*, cit., p. 104.

¹⁰⁵ Centro Studi Riccardo Massa (ed.), *Aprire Mondi. Un percorso nella pedagogia di Riccardo Massa*, Milano, FrancoAngeli, 2021.

Photography in Children's Literature in the 1960s and 1970s. A bibliographic review of Italian publishing houses and projects

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ABSTRACT: The article aims to explore the Italian editorial landscape related to photographic books for children, with particular reference to the period between the sixties and seventies. In fact, after having presented the major changes that have taken place since the 1960s in the world of children's publishing, with the birth of publishing houses such as Emme Edizioni, an in-depth discussion on the use of photography as a narrative language for children is presented. The innovative proposals of Bruno Munari, Giovanni Belgrano and Mario Mariotti and other authors and artists will be illustrated, as well as the use that Mario Lodi made of photography through the serial publication «Biblioteca di lavoro». Finally, will be proposed a reflection on photo books in the current publishing market in Italy.

EET/TEE KEYWORDS: Photographic Books; Children's Literature; Mario Lodi; Italy; XX Century.

Introduction

As it is known, between the 1960s and 1970s, we witnessed a period of deep cultural, social and political renewal, which also affected the world of children's publishing. In fact, new proposals, which marked a real editorial revolution, were appearing on the market. New images and contents came on the scene, including the ones, which were proposed by publishing houses, such as Emme Edizioni by Rosellina Archinto, Dalla parte delle bambine, La Coccinella by Loredana Farina and other courageous choices, which were committed to defend the idea of publishing with a deep care in seeking out authors and illustrators and, therefore, artistic and literary quality, as well as thematic depth.

Other publishing adventures started, such as those proposed by Armando, publishing house born in Rome in 1949, which was specialized in pedagogical and didactic texts and decided to expand the area for children's books in the early 1970s; thus, the collection «Biblioteca per genitori e per bambini» was born and later was entitled «Biblioteca di casa e di classe», which was directed by Gabriella Armando from 1972 to 1977¹. However, Gabriella decided to start a new business together with her brother Luigi Antonello in 1977: this is how Nuove Edizioni Romane was born, a publishing house, which chose a little boat as its logo and was ready to sail that creative and innovative season of the Italian children's market with great attention towards foreign publishing². Nuove Edizioni Romane intended to give its contribution to children's literature, which was considered an inferior genre too often and «not a precious art with which adults communicate with children»³. The children to whom NER was addressed were modern, playful, clever, active and autonomous and the choices of the publishing house were inspired by a positive, serene and creative vision of childhood⁴. They were characterized by happy intuitions and a selection of quality writing and illustrations.

As Paola Vassalli clearly highlighted, the 1970s were the

years when a graphic and content revolution took place in the books for our young readers thanks to the 'ladies of the Italian children's publishing', the effervescent climate and the 'open borders'. The happiest expression of the *picture book* was also consolidated in Italy during an age of aesthetic provocations and, as an apprentice reader, the child lost the status of 'minor' to acquire equal dignity as an adult reader⁵.

Stories also changed because they were the same ones which «mom and dad read in their books and on the pages of newspapers»⁶. Thus, there were ecological stories, stories about diversity, solidarity and friendship in search of identity, in short, stories of life⁷. Those were the years of three milestones in the history of children's publishing: in the early 1970s, Einaudi published *La grammatica della fantasia* by Gianni Rodari, *Guardare le figure* by Antonio Faeti and the editorial series «Tantibambini» by Bruno Munari, as Vassalli points out. In that period, the first children's bookshops were born and precious collections were also published, such as «L'arte per i bambini», edited by

¹ S. Sola, P. Vassalli, *I nostri anni '70. Libri per ragazzi in Italia*, Mantova, Corraini, 2014, p. 69.

² See: C.I. Salviati, *Nuove Edizioni Romane: libri che continuano a fare storia*, Firenze-Milano, Giunti, 2021.

³ *Ibid.*, p. 17.

⁴ *Ibid.*, p. 20.

⁵ Sola, Vassalli, *I nostri anni '70. Libri per ragazzi in Italia*, cit., p. 13.

⁶ *Ibid.*

⁷ *Ibid.*

Pinin Carpi, and the pedagogical «Biblioteca del lavoro»⁸. Furthermore, 1964 was the year when the Bologna Children's Book Fair was born⁹.

Among the publishing houses, which mostly introduced «new signs of graphic designers, painters, great artists and extravagant stories»¹⁰, we remember the above-mentioned Emme Edizioni by Rosellina Archinto, which was founded in Milan in 1966. Archinto, who was defined by Emy Beseghi as a «courageous pioneer of children's books»¹¹, visually revolutionised them thanks to her «almost prophetic intuition and elaborate graphic research»¹² and «unsettling and original attention»¹³. She collaborated with names, who gave rise to innovative experimentations in children's books, such as Iela and Enzo Mari, Bruno Munari – who had already anticipated that wave of renewal with the books, which were published by Einaudi and Mondadori in the 1940s –, Emanuele Luzzati, Giovanni Belgrano, but also Leo Lionni, Maurice Sendak, Maria Enrica Agostinelli and many others¹⁴.

Archinto said in an interview with Marcella Terrusi: «In my head, I was convinced that children's literature had to be a series A literature, edited with the same attention and love, which are necessary in publishing in general¹⁵», but the books from Emme Edizioni had to firstly deal with those who considered them too sophisticated and expensive¹⁶. In fact, as Paolo Canton also highlights,

[...] Emme Edizioni ends up placing itself in an uncomfortable position: its books are perceived as strange and cold by the most conservative part of the public, who used to think about ornaments and flourishes as elements denoting a beauty out of any narrative function [...], on the one hand, and as snobbish and uselessly aestheticizing by a progressive avant-garde, who wanted only products, which programmatically renounced any claim to beauty and value, to be destined for people's education due to a misunderstood pauperism (they called them books 'for architects' children'), on the other hand¹⁷.

⁸ *Ibid.*, p. 15.

⁹ *Ibid.*, p. 27.

¹⁰ M. Terrusi, *Il mestiere dell'editore: conversazioni con Rosellina Archinto*, in *alla lettera emme: Rosellina Archinto editrice*, Bologna, Giannino Stoppioni edizioni, 2005, p. 54.

¹¹ E. Beseghi, *Rosellina Archinto: pioniera e archeologa*, in *alla lettera emme: Rosellina Archinto editrice*, cit., p. 24.

¹² *Ibid.*

¹³ *Ibid.*

¹⁴ About Emme Edizioni see: *alla lettera emme: Rosellina Archinto editrice*, cit.; L. Farina (ed.), *La casa delle meraviglie. La Emme Edizioni di Rosellina Archinto*, Milano, Topipittori, 2013; Hamelin (ed.), *Ad occhi aperti. Leggere l'albo illustrato*, Roma, Donzelli, 2012; M. Terrusi, *Albi illustrati. Leggere, guardare, nominare il mondo nei libri per l'infanzia*, Roma, Carocci, 2012.

¹⁵ Terrusi, *Il mestiere dell'editore: conversazioni con Rosellina Archinto*, cit., p. 55.

¹⁶ Ead., *Albi illustrati*, cit., p. 32.

¹⁷ P. Canton, *Progettazione grafica e realizzazione tecnica: una straordinaria longevità*, in Farina (ed.), *La casa delle meraviglie. La Emme Edizioni di Rosellina Archinto*, cit., p. 113.

Archinto says she wanted to «change the world of children's publishing, but the publishing house had a very hard life in the sense that no one took me seriously, everyone considered me a 'good' lady, who had the hobby of writing children's books, which drove me crazy with rage. Today, after fifty years, it is demonstrated that these books work very well. As I always say, if I had had beard and moustache, they would have taken me more seriously. I took myself seriously, the others didn't»¹⁸. To demonstrate that these were – and are – books, which work very well, it is enough to mention two titles from the publishing house's catalogue, which were respectively published in 1967 and 1969: *Piccolo blu e piccolo giallo* by Leo Lionni and *Nel Paese dei mostri selvaggi* by Maurice Sendak, which are considered real masterpieces today.

1. *Photography in Children's Books in the 1960s and 1970s*

The book from Emme Edizioni was «an 'object' book or, rather, a 'project' book in which a lot of people took part: not only publishers, writers and illustrators, but also graphic designers and photographers»¹⁹. In fact, Emme Edizioni chose to communicate through a new language: language was renewed in methods and contents of narration, but also in graphics and illustrations. In fact, if until then it was common to include photographs in encyclopaedic and popular science books, it was not so frequent in children's books. However, the collaborators from Emme Edizioni loved experimenting and also used photographic language. This was nothing new for Bruno Munari, who had always expressed his creative activity in various forms of experimentation ranging from painting, sculpture, design, photography and teaching. In fact, photography had always played a significant role in Munari's artistic production and critical thinking. He had often made photography the protagonist of his projects: he created his *Supplemento al dizionario italiano*, which was published for the first time in 1958 with a photographic language where the author examined various ways of expressing without speaking, not only with hands, but also with facial expressions and personal attitudes²⁰, or *Da lontano era un'isola*, edited by Emme Edizioni in 1971, where we can find several photographs of stones, leading us to discover «a world behind the folds of stones, which suddenly fill up with characters, who are drawn following the lines and veins of the stones»²¹.

¹⁸ Farina, *La casa delle meraviglie. La Emme Edizioni di Rosellina Archinto*, cit., pp. 31-32.

¹⁹ Sola, Vassalli, *I nostri anni '70*, cit., p. 28.

²⁰ See: <<https://corrains.com/it/supplemento-al-dizionario-italiano.html>> (last access: 17.02.2025).

²¹ See: <<https://corrains.com/it/da-lontano-era-un-isola.html>> (last access: 17.02.2025).

In 1973, Munari published *Un fiore con amore* with Emme Edizioni, a photographic book, which illustrated to children the practice of *ikebana*, that is, the art of creating a floral composition because, as the Milanese artist explained, every occasion is a good one to give a flower, from Mother or Father's Day to the long-awaited arrival of spring, from a little brother's birthday to a neighbour's wedding²².

Between 1972 and 1978, Munari was the creator and the editor of the collection «Tantibambini», which was published by Einaudi with over sixty titles and an almost square format (24x23) and characterised by staple stitching and a story, which directly started from the cover. Furthermore, «the sequence of the story almost always followed a cinematographic style, which could be easily understood by children»²³. In that project, Munari involved not only artists, poets, designers, architects and educators, but also art directors and photographers as authors and illustrators. In fact, among many prestigious names, there was also Mario De Biasi, a photojournalist from «Epoca», who collaborated in the creation of the issue *Mamme favole e bambini* «where intense photographs, which told stories about motherhood, were accompanied by fairy tales and legends from all over the world and the reproduction of typical decorative motifs»²⁴. Photographs were also in other issues, such as *Il palazzo di gelato e altre otto favole al telefono* containing eight telephone fairy tales by Gianni Rodari, which were accompanied by a colour photographic sequence by Alberto Munari²⁵. Images showed a little girl in her bedroom, which was filled up with soft toys, while she was on the phone with her father.

Munari also used photography in another project he shared with another collaborator from Emme Edizioni, the pedagogist and teacher Giovanni Belgrano, who was known for having published *Giochi di terra*, *Giochi d'acqua* and *Giochi d'aria*²⁶ with this publishing house in the early 1970s. In fact, both of them designed and created a series of visual games for Danese, including *Immagini della realtà*, that is, forty photographic images representing some subjects from various points of view and with different forms:

A shoe, a hand, a fish or a light bulb can seem like very different objects if they are seen from different perspectives or if they are described as evolving objects where the name is only one of many possible representations. By comparing a realistic colour photograph with a black and white one, a photographic negative or, even a written word (in six

²² B. Munari, *Un fiore con amore*, Trieste, Einaudi, 1997, p. 7.

²³ Cf. Sola, Vassalli, *I nostri anni '70. Libri per ragazzi in Italia*, cit., p. 95. See also: A. Rauch, *Il mondo come design e rappresentazione. Ritratti d'occasione per ventisette maestri dell'illustrazione e della grafica: Altan, Seymour Chwast, Alan Fletcher...*, s.l., Usher Arte, 2009.

²⁴ Cf. Sola, Vassalli, *I nostri anni '70*, cit., p. 96.

²⁵ G. Rodari, *Il palazzo di gelato e altre otto favole al telefono*, «Tantibambini», n. 5, 1972.

²⁶ It is a «book-workshop» in which some games are proposed to be made involving the three elements, earth, water and air and in which the author inserts texts, drawings and black and white photographs and invites readers to observe, build and play.

languages: Italian, English, French, German, Spanish and Japanese), the game stimulates and facilitates how to learn differences between real objects and their representations²⁷.

Munari is also known for the poetic book *Cicci Coccò* where the designer's words were accompanied by Enzo Arnone's photos. The book, which was published by Fotoselex in the 1980s and now republished by Corraini, has evocative black and white images telling a story of childhood, games and discoveries, which were accompanied by simple sentences representing the words and thoughts of children, who were portrayed in the photos²⁸.

In the Emme Edizioni catalogue, there are other books telling stories through photographic language. Consider, for example, *Ariele. Un bambino e il mare* from Collettivo Tre, which was published in 1976, a story of discovery and friendship where black and white photography welcomed the incursion of colour illustrations and which told us about the child Ariele's day. Ants, little crabs, a grumpy octopus, a sea urchin, the fish Alfonsino and even fearful snails are colour illustrations. These illustrations "entered" the photograph portraying Ariele at the seaside among the cliffs of a beach, while he met these little friends.

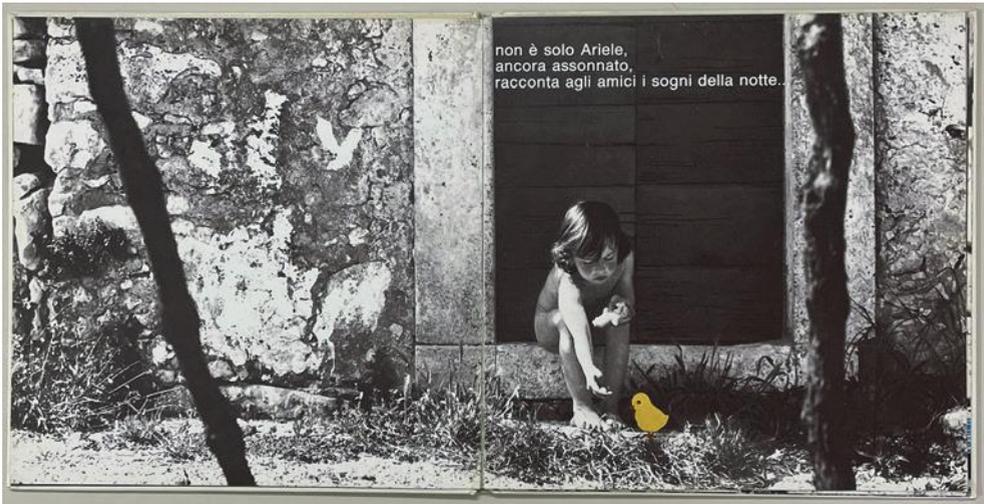
The use of photography can be also found in other books from the Milanese publishing house, which distinguished for its strength and variety of iconographic proposals, consulting «graphic designers, painters, illustrators, photographers, visual communication experts, professionals or promising amateurs»²⁹, as we have seen. This is the case of proposals by Ermanno Cristini and Luigi Puricelli, Nico Orenco, Maurice Maeterlink, Paola Calvetti and Nicoletta Ramorino³⁰. Cristini and Puricelli proposed images, which were cre-

²⁷ See: <<https://corraini.com/it/immagini-della-realta.html>> (last access: 17.02.2025).

²⁸ About the relationship of Bruno Munari with photography, see: M. Campagnaro, "A successful photograph is worth as much as a story". *The influence of Photography on Bruno Munari's picturebooks*, in E. Druker, B. Kümmerling-Meibauer (edd.), *Photography in Children's Literature*, Amsterdam, John Benjamins Publishing Company, 2023, pp. 144-167. And again, for a deeper look at the work of Bruno Munari, see: M. Campagnaro, *The Function of Play in Bruno Munari's Children's Books. A Historical Overview*, «Ricerche di Pedagogia e Didattica», vol. 11, n. 3, 2016, pp. 105-111; Ead., *Bruno Munari's Visual Mapping of the City of Milan: An Historical Analysis of the Picturebook Nella nebbia di Milano*, in N. Goga, B. Kümmerling-Meibauer (edd.), *Maps and Mapping in Children's Literature: Landscapes, seascapes and cityscapes*, Amsterdam & Philadelphia, John Benjamins Publishing Company, 2017, pp. 147-163; Ead., *Do touch! How Bruno Munari's Picturebooks work*, «Rivista di storia dell'educazione», vol. 6, n. 1, 2019, pp. 81-96; L. Cantatore, *Il libro per bambini come opera d'arte totale: Bruno Munari, Lele Luzzati, Maria Lai*, in A. Antoniazzi (ed.), *Scrivere, leggere, raccontare... La letteratura per l'infanzia tra passato e futuro. Studi in onore di Pino Boero*, Milano, FrancoAngeli, 2019, pp. 159-170; L. Cantatore, *Dismantle and rebuild the house in the Italian picture books of the 1940s. Mario Sturani, Elsa Morante, Bruno Munari*, «EDUCAZIONE. Giornale di Pedagogia critica», vol. 7, n. 1, 2018, pp. 97-116.

²⁹ I. Tontardini, *Senza parole: il respiro delle immagini*, in Farina, *La casa delle meraviglie. La Emme Edizioni di Rosellina Archinto*, cit., p. 133.

³⁰ About photography books, see the recognition by Giuseppe Garrera and Sebastiano Tri-



Pic. 1. *Ariete. Un bambino e il mare* by Collettivo Tre (Emme Edizioni, 1976)

ated with the use of photography and then integrated with graphics in wordless books, *Il fiume scende scende...*³¹, *Il ragno e la sua tela*³² and *Il papavero*³³. As Ilaria Tontardini rightly points out, these are «real documentaries in the form of picture books»³⁴ where photography was used because «it allowed for a more detailed representation of reality and produced more stimulating images for children's observation skills»³⁵. Those were books where «colour – a few primary tones redrew photographic images – acted as a supporting structure»³⁶.

In 1974, Emme Edizioni published *La leggenda del paradiso* by Lies Wiegman and Margareta Strömstedt, a picture story about the topic of creation with black and white photographs, which was translated by Rosellina Marconi, and, in 1975, *Andare per mare, storia del capitano Rebissu e della sua barca Gianchettu* by Nico Orengo with illustrations by Franco Mello and photographs by Paolo Persano. The collaboration between this graphic designer and this photographer allowed to propose a mix between drawing and photography.

ulzi: *Il libro dei libri per bambini. Gli anni Sessanta e Settanta: la rivoluzione*, Roma, Diacritica edizioni, 2019.

³¹ E. Cristini, L. Puricelli, *Il fiume scende scende...*, Milano, Emme Edizioni, 1974.

³² Idd., *Il ragno e la sua tela*, Milano, Emme Edizioni, 1975.

³³ Idd., *Il papavero*, Milano, Emme Edizioni, 1977.

³⁴ Tontardini, *Senza parole: il respiro delle immagini*, in Farina, *La casa delle meraviglie. La Emme Edizioni di Rosellina Archinto*, cit., p. 135.

³⁵ *Ibid.*

³⁶ *Ibid.*



Pic. 2. *Andare per mare, storia del capitan Rebissu e della sua barca Gianchettu* by Nico Orengo (Emme Edizioni, 1975)

The project by Paola Calvetti and Nicoletta Ramorino was also interesting: in 1980, Emme published a manual about mime and the relationship with body with the title *Lo spazio fantastico. Mimo e danza come gioco*, which used various photographs to give young readers instructions on how to start expressing with their own body,

or better, embodying nature, animals, fairy tales and their own myths, representing with their own body the life of a tree from birth to death through the cycle of the four seasons, imitating fire or sea waves, having fun writing letters with their own body, learning to disguise themselves, performing shadow puppetry with their hands and, finally, the instructions for setting up a small show³⁷.

Finally, the publishing houses La Nuova Italia and Fatatrac allowed us to know the amusing volumes by Mario Mariotti, which were published between the 1980s and 1990s, such as *Animani e Umani*, which showed splitting and multiplying painted hands – belonging to the artist –, giving life to ever new characters, who were photographed by Roberto Marchiori. As Giulia Mirandola points out, in the case of *Animani*, for example, Mariotti «just needed a pair of hands to draw cocks, elephants, zebras, octopuses, doves, dogs, crocodiles, panthers, flamingos and white rabbits with his body and to provoke the

³⁷ Garrera, Triulzi, *Il libro dei libri per bambini. Gli anni Sessanta e Sessanta: la rivoluzione*, cit., pp. 276-277.

game of reading»³⁸. Mariotti proposed wordless stories and also created other playful books, such as *Fallo di mano* where painted hands changed into football players³⁹, and *Inganni* where the artist painted his face and the parts of his body to create new images and shapes.

2. Mario Lodi and photography: the experience of the serial publication «Biblioteca di lavoro»

Photography played a significant role in the serial publication «Biblioteca di Lavoro», which was conceived as an alternative to the traditional textbook. This initiative, which was promoted by Mario Lodi and an experimental group he coordinated, was published from 1971 to 1979. In this case, photography was used not only as a historical testimony of a collective school image with the intent of revealing the pedagogical and social climate during that period⁴⁰ or as a photo accompanying a historical, social, scientific or cultural text, but also to plunge the reader in children's stories where photography mixes with drawing, sometimes using the collage technique.

Photography was a real passion for Mario Lodi⁴¹. Photographer Luigi Briselli with whom Lodi collaborated in the creation of exhibitions and photographic books remembers it:

I was a young self-taught man with a burning passion for photography to which I devoted every moment in my free time. For several years, I have experimented, read and observed the great photographers' images to identify myself with, to understand their shots, to

³⁸ G. Mirandola, *Libri senza parole? Li voglio subito*, in Hamelin (ed.), *Ad occhi aperti. Leggere l'albo illustrato*, cit., pp. 125-126.

³⁹ The exhibition *Animani*, a tribute to Mariotti, held in the exhibition spaces of the Istituto degli Innocenti in Florence from 29 November 2009 to 11 April 2010 and curated by Stefano Filipponi, Francesca Mariotti, Gianni Pozzi and Andrea Rauch. The exhibition presented a hundred works of «painting on the body» made by the artist in the Eighties and Nineties and reproduced through media and languages of great circulation as the photography, the book, the video and the advertising (<<https://www.istitutodeglinnocenti.it/it/foto/mario-mariotti-animani>>, last access: 07.03.2025).

⁴⁰ V. Valecchi, S. Pacelli, *School Life Representation in the Photographic Images of the Dossier Series "Biblioteca di Lavoro" by Mario Lodi*, in L. Paciaroni (ed.), *The School and Its Many Pasts. I. The Different Types of School Memory*, vol. I, Macerata, eum, 2024, pp. 67-76, in partic. p. 68. For more details, see: S. Pacelli, *Una scuola per leggere la vita: il mondo del lavoro nella collana Biblioteca di lavoro e nei giornali di classe di Mario Lodi*, «History of Education & Children's Literature», vol. XIX, n. 1, 2024, pp. 377-393; M.R. Di Santo, *Mario Lodi e la "Biblioteca di Lavoro". Una proposta didattica alternativa ancora attuale*, Reggio Emilia, Edizioni Junior, 2022.

⁴¹ About Mario Lodi, see: L. Cantatore, J. Meda, F. Tonucci (edd.), *Mario Lodi: maestro, intellettuale, scrittore*, Roma, Carocci, 2024; Associazione 25 aprile (ed.), *Pedagogia e Costituzione. Riflessioni su Mario Lodi, Gianni Rodari e Paulo Freire*, Milano, FrancoAngeli, 2022.

learn and to find my way. I felt that this lens offered me the possibility to express; it was becoming day by day an indispensable appendix of my body, which allowed me to see and to represent the world through myself with a language words could not have replaced. [...] I was looking for someone who understood and gave me the opportunity for a comparison and I found Mario Lodi in 1980, the year of my first publication⁴².

In fact, Briselli intended to publish a photographic book about the old crafts in the Po Valley, but he was looking for someone who wrote the text in order to contextualise the story through images:

Mario listened to me, looked at my photos, was amazed and became passionate about the work of documenting the last gestures of a rural world, which my lens captured and fixed, while it was quickly disappearing. The peasant world had long been one of his great interests. He did not hesitate to offer me his availability⁴³.

Thus, a long friendship was born, which allowed Briselli to trace a clear and sincere image of the relationship between Mario Lodi and photography:

Mario loved photography very much. He liked walking in the countryside and photographing what he met in its natural reality, without any aesthetic selection. He loved countryside and life on the farm and he often took his students there for unforgettable outdoor experiential lessons. [...] He was fascinated by trees. He photographed them in any way and condition. One day, I saw the children's drawings with poems and stories about trees near him. I was struck by the magic and freshness they expressed. So, we decided to publish a volume about trees and poems: drawings, photographs and poetic texts. We composed it in three parts: the children's poetic and fascinated gaze, which was commented by Mario Lodi; the photographs of the trees, which were the protagonists of our landscape, commented by Edo Ronchi and placed next to the great poets' verses; the monumental trees, which were photographed between the north and the centre of Italy and accompanied by Riccardo Groppali's descriptions and reflections. It was published by Persico in 1998⁴⁴.

Black and white photography was often chosen in the issues of the serial publication «Biblioteca di Lavoro» to tell the story of teachers and students' daily school life. Consider the issue with the title *Mangiamo insieme* where the authors, the teachers Ornella Landucci and Fiorenzo Alfieri, introduced one of the activities, which was carried out during the year, that is, cooking, addressing to the «child, who was reading». The authors clarified that school was full-time and they had lunch together every day: this very important moment was made “monotonous” by the weekly menu:

Since we got tired of always eating the same things, we decided to prepare some food we liked. For this reason, a working group (also made up of children from other full-time third-year classes) has been preparing the 10.30 breakfast and, sometimes, even desserts

⁴² Cf. Website Casa delle Arti e del Gioco: <<https://www.casadelleartiedelgioco.it/un-maestro-per-amico-luigi-briselli-per-mario-lodi/>> (last access: 17.02.2025).

⁴³ *Ibid.*

⁴⁴ *Ibid.*

for several months. (The group members changed every month). We want to tell you about our experience because we think you could do it together with your classmates, too⁴⁵.

The issue includes instructions on how to set up the cooking laboratory, which is illustrated through photographs. Images also show the children, who were engaged in various activities, such as removing crust from bread, slicing mozzarella or beating eggs. Below were photos of the dishes prepared, which were accompanied by the relative recipes, and an invitation to involve parents collecting traditional recipes from their home country.

There are also various issues portraying through photography not only scenes of daily school life with images of children drawing, painting and collaborating in the creation of a journal or taking part in the school party⁴⁶, but also those relating to crafts and activities, such as making bread or spinning flax. Many current and historical topics are then discussed, such as Matteotti's murder or the sentences of the Italian military law courts during the First World War.

As well highlighted by Silvia Pacelli, the issues *Documenti*⁴⁷

mainly aimed at restoring testimonies and experiences in the past where traditional crafts were also portrayed in their difficulties and a wide space was given to workers' protests leading to the conquest of important rights⁴⁸, unlike the homologating and simplistic representations, which were transmitted in school textbooks.

Pacelli always highlights how in this editorial project

the basic purpose remained stimulating discussion, discovery, cooperation among students and awareness of social dynamics to understand their own time and to start feeling protagonists of history, while, in traditional schools, they 'do not learn to know current society, that is, what a factory, a farm, a union, a law court or a party is. They do not study those things of the past, which are useful for understanding the present'⁴⁹.

In numbers 70-71, we find a series of memories by elderly people coming from the village of Cervara in the municipality of Pontremoli, which was inhabited by 400 people at that time. The issue *Vecchi a Cervara* contains a mosaic of memories – enriched by photographs – which allows us to retrace the

⁴⁵ O. Landucci, F. Alfieri, *Mangiano insieme*, «Biblioteca di lavoro», n. 24, 1974.

⁴⁶ For example, in the dossier *Prima dell'ABC* (n. 56, 1976) curated by Francesco Tonucci and Tullio De Mauro, on the cover there is a photograph of a child drawing with a marker while inside there are other black and white photographs showing children engaged in painting.

⁴⁷ «Biblioteca di Lavoro» was divided into *Documenti*, *Lecture* and *Guide*. In fact, «the series' papers are divided into three main categories: *Lecture*, short stories that offer ideas for reflection on social and environmental issues; *Guide*, examples of educational paths made by MCE educators; *Documenti*, real sources and testimonials for school research» (Cf. Pacelli, *Una scuola per leggere la vita: il mondo del lavoro nella collana Biblioteca di lavoro e nei giornali di classe di Mario Lodi*, cit., p. 384).

⁴⁸ *Ibid.*

⁴⁹ *Ibid.*, pp. 383-384.

history of old games, food, traditions, religious ceremonies and much more. The issue was edited by Francesco Tonucci, who reiterated the importance of these memories of the past for kids, who went to school, because «old people are important for the years they lived, the things they saw, their history and their culture, especially today in the midst of very rapid changes, which make us lose the sense of what there was and there had been»⁵⁰.

Then, a playful and funny mix of visual representations can be found in some issues where photography and illustrations combine together in order to become a single image, as in *Giovannino senza paura*, edited by Caterina Foschi Pini. The issue tells the story of Giovannino, a six-year-old boy, who left home and rode his bicycle till Cathedral Square in Milan. The illustrations the children made and black and white photographs came into contact, complemented one another and overlapped on the pages. On the cover, we see a photograph of a large city with the addition of a small illustration representing the child and his bicycle. The story begins this way: after playing at home with his sisters, Giovannino, who is portrayed in a black and white photograph, asked his mother to use his new bicycle in the courtyard. On the next page, there is a photo of a street with buildings and cars. Immediately after, there is a mix of drawings and photos. The – photographed – silhouette of Giovannino on his bike mixes with the drawing of a road with cars and buses. On the next page, Giovannino has finally arrived at Cathedral Square: the scene is represented by a mix of photos and drawings of pigeons, cars, traffic lights and architectural elements belonging to the Cathedral, which mix together to create a single large image. As explained on the last page, this story wanted to tell

the real story of a child, who «runs away», because «he's somewhat tight», he wants to see the world, he wants to prove to himself and other people that he is able to do things on his own. Therefore, it is an invitation to all the children to reflect on their big problems: why are children «somewhat tight»? perhaps, not only those who have a small house, but also those who do not have a place to play or an adult to talk to or... are somewhat tight⁵¹.

Therefore, the issues of «Biblioteca di Lavoro» were also precious resources for making adults and children reflect on pedagogical, cultural and social questions. For example, in the issue with the title *L'alfabeto*, edited by Mario Lodi, the teacher emphasized that «all the children are different, because they are the result of the experiences they have made in the socio-cultural environment where they have lived since birth»⁵² and they «are curious. Since they were born, they have touched, put in their mouth, observed, dismantled and destroyed to see how things are made, therefore to know»⁵³. In this number,

⁵⁰ F. Tonucci, *Vecchi a Cervara*, «Biblioteca di Lavoro», nn. 70-71, 1977.

⁵¹ C. Foschi Pini, *Giovannino senza paura*, «Biblioteca di Lavoro», n. 69, 1977.

⁵² M. Lodi, *L'alfabeto*, «Biblioteca di Lavoro», nn. 92-93, 1979.

⁵³ *Ibid.*, p. 8.

there are some photographs, which reproduce many small simple things surrounding us, but we do not always notice them: a small plant, which trims from the asphalt, grass on the wall, a fly and a lizard among stones. They are small details, which can be noticed when observation is careful – like children do – and so many discoveries can be made to comment on them together. In fact, there are many things to be discovered in the courtyard, along the walls or in the flowerbeds and «the children's long sight» can precisely discover many small details, as Lodi underlines. Lodi invites us to use a camera to «take colour slides for every [...] significant discovery the children made, without any exception, to then comment on them together when we project them»⁵⁴. Therefore, reality, which is reproduced by a camera, is not static, but a rich reality, which can then become a rich alphabet book, or rather, a logical vocabulary where each word recalls an object and its place and friends, according to Lodi: «Like a *sparrow*, which lives on *grains* and flies in the *sky*»⁵⁵.

Among the issues of the serial publication «Biblioteca di Lavoro», there are also stories, which were told only through images: they are real wordless books, as in the number about the zoo, edited by Caterina Foschi Pini and illustrated by Ivo Sedazzari. The photographs of free-roaming animals are proposed within a comic strip, in contrast with the illustrations on the next page where animals are depicted locked in a cage at the zoo. This proposal demonstrated the effectiveness of photography. In fact, as Foschi Pini points out:

Stories, which are made up of images, only seem effective to us, because images are an essential language, which speaks to children's minds through their eyes. [...] The figurative story becomes a way to read the «reality» represented, which accustoms children to observe, to reflect and to connect facts, contributing to the creation of their critical sense, which will be useful to them to then analyse the «reality» experienced⁵⁶.

The aim was to «stimulate children to reason and to discover that animals can be known only within their natural environment where they were born and grown up. Finally, the discussion extends to children, connecting their situation of repressed people in their deep vital needs with the animals at the zoo, which are deprived of their freedom»⁵⁷.

Stories with only images were not new to «Biblioteca di Lavoro»: in fact, a book with only illustrations is also *Nel fosso*, which deals with the question of men, who break ecological balance⁵⁸.

Photographs were used in *Coniglietto mi piaci e altre poesie di bambini* where we can find a collection of children's poems: each poem was accom-

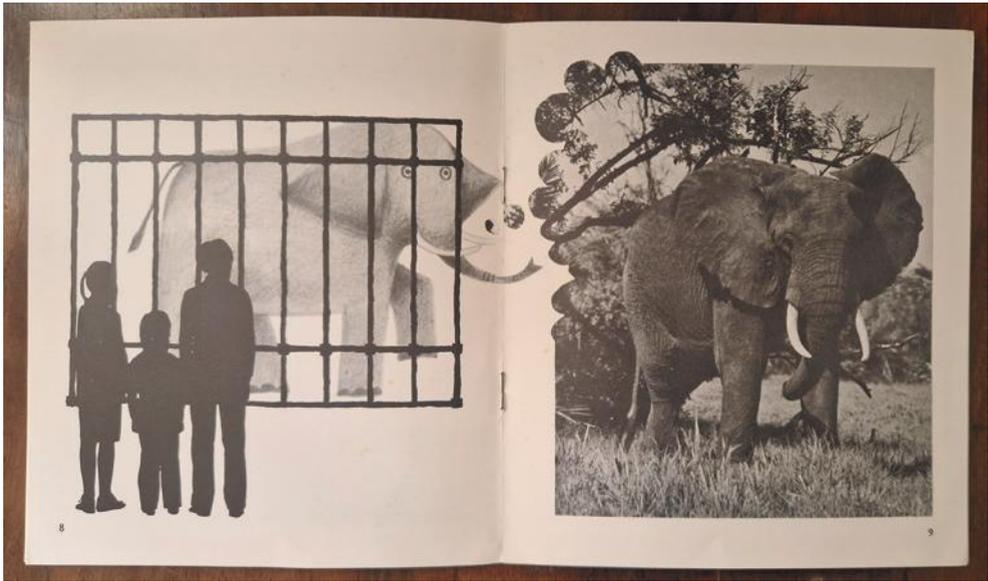
⁵⁴ *Ibid.*

⁵⁵ *Ibid.*, p. 11.

⁵⁶ C. Foschi Pini, *Lo zoo*, «Biblioteca di Lavoro», n. 37, 1975, p. 16.

⁵⁷ *Ibid.*

⁵⁸ G. Selvatico, *Nel fosso*, «Biblioteca di Lavoro», n. 8, 1973.



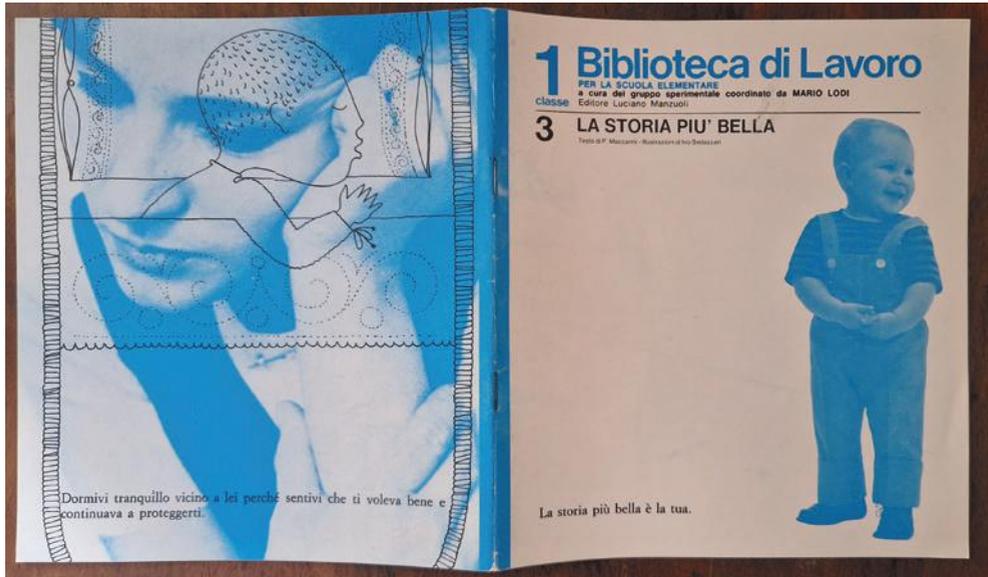
Pic. 3. *Lo zoo*, «Biblioteca di Lavoro», n. 37, 1975

panied by a black and white photo. Finally, an innovative and curious use of photography emerges from the issue with the title *La storia più bella*, edited by Palmira Maccarini and illustrated by Ivo Sedazzari⁵⁹. Photographs alternate with drawings throughout the story – a mother told her child about the months of pregnancy from when he was «a tiny egg like a little grain of sugar» until the moment of birth –. Starting from the cover, photographs appear as blue outlined figures showing a smiling child and a pregnant mother. On some pages, photography and illustration became one like in the back cover where the shot representing the mother's face overlaps a drawing, which was only made with a black line and illustrates the child sleeping relaxed in his bed.

Therefore, Lodi considered photography – which was accompanied by comments – as a precious tool. Photography was used as a teaching resource: in fact, the teacher sometimes photographed the children's drawings and then projected those slides, which were accompanied by children's explanations, to the parents since the combined use of slide projector and recorder allowed the creation of suggestive «shows», using the children's expressive and creative observation skills, «a generally wasted heritage»⁶⁰. Consequently, Mario Lodi's children were familiar with the camera as a tool for communicating, expressing and understanding its wide artistic and creative potential.

⁵⁹ P. Maccarini, *La storia più bella*, «Biblioteca di Lavoro», n. 2, 1973.

⁶⁰ *Come nasce una storia*, «Biblioteca di Lavoro», 197[?].



Pic. 4. *La storia più bella*, «Biblioteca di Lavoro», n. 2, 1973

Conclusions

Therefore, the 1960s and 1970s in Italy represented an important watershed in the world of children's publishing: in fact, they were the years of great experimentations in the context of children's books not only for the topics dealt with, but also in terms of visual narration, which saw an innovative and expressive use of photography.

In recent times, the topic of photography in children's books has received great attention in Italy. In fact, today there are various opportunities for comparison through examinations⁶¹, conferences⁶², workshops⁶³ and exhibi-

⁶¹ See the 125th issue of «Liber», published in 2020, which proposed several contributions on the subject *Scatti bambini. Infanzia e fotografia dialogano per costruire nuovi sguardi*.

⁶² For example, the conference *Photography in Children's Literature*, organized by the University of Stockholm on 20 and 21 May 2021, whose contributions have conflated into a volume that represents an important international study that examines the wide range of artistic techniques, themes and genres used in children's photo books. Cf. E. Druker, B. Kümmerling-Meibauer (edd.), *Photography in Children's Literature*, Amsterdam, John Benjamins Publishing Company, 2023.

⁶³ It should be recalled, for example, the conference on image education, held in October 2020 and promoted by the Museum of Contemporary Photography of Cinisello Balsamo whose contributions were then merged into the volume *Immagini come alfabeto. La dimensione pedagogica della fotografia*, curated by Diletta Zannelli, Laura Formenti and Andrea Pinotti. Recently, courses and meetings with experts in visual education, photographers, illustrators and artists have also been proposed: such as those organized by the independent bookshop SpazioB**K

tions⁶⁴, which are promoted by various entities, such as bookshops, associations, photographers, museums, illustrators and experts in visual education and children's literature, in addition to witnessing many considerable publications of quality books and photographic albums.

For a long time, photographs in children's books have been considered unsuitable because they were too realistic, leaving little room for imagination – just to mention one of the reasons for the mistrust towards this language for children –. The perspective has slowly changed – firstly, in countries, such as France – until it has overcome prejudices even in Italy in recent times⁶⁵. As Anna Castagnoli rightly points out,

in fact, the accusation, which is brought against photography in children's books more often, is not to place a filter of personal interpretation, which can be stylised enough to reduce the dramatic components of reality between children and world. This accusation is also brought against drawing less strongly when it is too realistic. Realism always arouses suspicion and fear in children's books as if looking at reality 'as it is' in a two-dimensional reproduction was dangerous or too difficult for children⁶⁶.

This concept is also well explained by Giovanna Zoboli: «The prejudice we have towards photography in children's books depends on stereotypes according to which a narrative for children is a fantastic narrative and an idea of fantasy and fairy tale where the illustration, its imaginative elaboration (in the sense of 'non-objectivity'), enjoys the children's favour»⁶⁷.

In recent times, the Italian publishing context is being enriched with high-quality proposals, which are also using photographic language, sometimes

in Milan and by Irene Greco, creator of the project *Leggimiprima, l'arte di comunicare con i bambini attraverso i libri e le storie*.

⁶⁴ For example, the bibliographic exhibition *Libri per bambini con il culto dell'immagine*, organized by the association Cartastraccia in collaboration with photographer Alessandro Dandini de Sylva and inaugurated in 2018 in Rome, at the Fondazione Pastificio Cerere. This is an exhibition of photographic publishing for children with publications from the private collection of Giuseppe Garrera and the Malaspina Foundation's library. In 2020 the association Cartastraccia organized an exhibition of photographic books at the Library of Cisterna di Latina, selecting a bibliography of photographic books available in the online catalog of the library, <https://opac.regione.lazio.it/SebinaOpac/query/KF_SO:%22fi%20libri%20fotografici%20per%20ragazzi%22?sysb=RL1YN&context=catalogo>, (last access: 21.02.2025). About exhibitions and photographic books for children, in 2024, within the international festival of photography *Cortona on the move*, was organized the exhibition *Giro Giro Corpo. Fotolibri per bambini e adulti bambini*, whose editorial research has been curated by the bookshop SpazioB**K and by Kublaiklan collective. And finally, *Focus – Collezione provinciale di libri fotografici per bambini e ragazzi* is a collection kept at the library of the Province of Trento.

⁶⁵ See: L. Le Guen, *Cent cinquante ans de photolittérature pour les enfants*, Nantes, MeMo, 2022.

⁶⁶ A. Castagnoli, *L'immagine tra realtà e metafora: una breve storia della fotografia nei libri per bambini*, in D. Zannelli, L. Formenti, A. Pinotti (edd.), *Immagini come alfabeto. La dimensione pedagogica della fotografia*, Cinisello Balsamo, Silvana Editoriale, 2021, p. 173.

⁶⁷ E. Grassi, *La parola agli editori*, «Liber», n. 125, 2020, pp. 28-31, in partic. p. 30.

combining it with illustrations⁶⁸. If we look at the publishing market for children and teenagers in Italy today, it is clear how different experimentation into children's books is: several illustrators and authors have made photography their style signature. It is no longer reserved exclusively for classic 'encyclopaedic' volumes, popular science books or books for early childhood where children learn to recognize what surrounds them through highly iconic images – think of “books with faces” or nomenclature books series⁶⁹ –, but photography has also become an expressive and illustrative tool in other kinds of books for children and teenagers. For example, think of artist's books and picture books or its innovative and poetic use in hardback books⁷⁰ or wordless books where images invite us to read the story through them.

In conclusion, if illustrations traditionally dominated the children's publishing context, photography has been gaining an increasingly important role. In recent years, children's publishing has been experimenting new ways of using photography: some books integrate photography with illustrated elements, also creating an innovative visual mix through the collage technique, other books propose an image, which is often accompanied by verses or rhymes and able to release imagination. In fact, the combination of text and photography creates a dynamic interaction stimulating the young readers' imagination and critical thinking.

Different genres, types and categories of publications demonstrate that it is possible to immerse oneself in an engaging narrative, even through photography. Furthermore, the use of photos in children's books can educate about beauty, observation and attention, as well as it represents a pleasant invitation to slow down, to lower one's gaze and to look around. Photography in children's books can also stimulate a change in our point of view and vision of the world. Therefore, photography is a language, which can speak to children and young people and is also happily crossing the world of Italian publishing.

⁶⁸ To cite just a few examples, we recall the illustrator Marianna Balducci (for example, A. Mozzillo, M. Balducci, *Io sono foglia*, Imola, Bacchilega Junior, 2020; M. Balducci, *La vita nascosta delle cose*, Savignano sul Rubicone, Sabir, 2020; M. Balducci, *L'ammiraglio si è preso il cielo*, Firenze, Clichy, 2022) but also *Sonno gigante, sonno piccolo* by Giusi Quarenghi and Giulia Sagromola (Milano, Topipittori, 2014), *Questa notte ha nevicato* by Ninamasina (Milano, Topipittori, 2017) and *come me, come te* by Carolina Zanier (Monselice, Camelozampa, 2024). Finally, consider «the photo raids» in *Un leone a Parigi* by Beatrice Alemagna (Roma, Donzelli, 2009).

⁶⁹ As Leyla Vahedi points out, «those who deal with the very small ones know the enormous effectiveness of photographic books: the objectivity and the recognizability of the objects, often outlined on a white background, are magnetic for the eyes of the first readers [...]», in L. Vahedi, *Libri fotografici per ragazzi, una ricognizione*, <<https://www.topipittori.it/topipittori/libri-fotografici-ragazzi-una-ricognizione>>, (last access: 23.02.2025).

⁷⁰ For example, consider the work proposed by Chiara Carminati and Massimiliano Tappari (*A fior di pelle*, Roma, Lapis, 2018; *Ninna no*, Roma, Lapis, 2019; *Piccolo verde*, Firenze-Trieste, Editoriale Scienza, 2022; *Cerca cerchi*, Roma, Lapis, 2023; *Batti cuore*, Roma, Lapis, 2024).

La direzione delle scuole elementari in vent'anni della rivista «Scuola Italiana Moderna» (1946-1966)

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The management of primary schools in twenty years of the «Scuola Italiana Moderna» journal (1946-1966)

ABSTRACT: In the decades from 1946 to 1966, the Italian school was heading towards those changes that, with the social and cultural revolution of 1968 and the emanation of the Delegated Decrees of 1974, would radically change its structure, as well as the appearance and function of head teachers. The professional journal «Scuola Italiana Moderna» gave voice both to the pedagogy of the Catholic area, albeit with some borrowing from neo-idealist pedagogy, and to the militant school and those who carried out the role of head teacher with commitment. The aim is to capture the debate of that historical moment on the evolving role and changing function of school management by analysing the obituaries as a unique historical source. By highlighting the alternating and intertwining positions presented in these articles (they are sometimes even discordant), the study seeks to understand the collective memory that was intended to be conveyed.

EET/TEE KEYWORDS: «Scuola Italiana Moderna»; Head teachers; Collective memory; Obituaries; XX Century.

1. *La funzione direttiva e la sua rappresentazione: articoli e necrologi*

La dirigenza scolastica è stata protagonista, a partire dagli anni Novanta del Novecento, di profondi cambiamenti all'interno della scuola italiana nel momento in cui la legge Bassanini sull'Autonomia della pubblica amministrazione ha modificato la struttura dell'istituzione che, dall'essere piramidale e gerarchica, si è configurata come comunità di apprendimen-

to¹. Il processo – iniziato nel 1974 con i Decreti Delegati che hanno aperto la scuola al territorio e affidato la sua gestione a tutte le componenti – ha trovato compimento, dal punto di vista legislativo, con il Regolamento sull'Autonomia scolastica del 1999².

Per questo motivo si è ritenuto opportuno indagare le radici dei cambiamenti della figura del dirigente scolastico nel periodo precedente così come emergono dalle pagine della Rivista negli articoli firmati da pedagogisti, uomini di scuola ed anche abbonati, in rapporto sia ai profondi mutamenti politici, sociali e culturali e pedagogici che caratterizzano l'Italia della ricostruzione, sia ai cambiamenti della legislazione³. L'analisi ha riguardato il ritratto della direzione scolastica in vent'anni di «Scuola Italiana Moderna» Rivista di orientamento cattolico, dall'immediato dopoguerra alla metà degli anni Sessanta (1946-1966) qualche anno prima della rivoluzione socio-culturale del Sessantotto. La Rivista è stata scelta in quanto in quel momento storico – oltre ad occuparsi sia di formazione che di didattica, coniugando la diffusione delle teorie pedagogiche con lo stato della scuola reale – è la più conosciuta dalle maestre e dai maestri italiani.

La ricerca non è esaustiva, in quanto in quel periodo, come in quello successivo, anche altre importanti riviste professionali di diverso indirizzo culturale erano diffuse tra le maestre e i maestri, basti ricordare, ad esempio, la rivista 'storica' «I diritti della scuola». In ottica anche comparativa, potrebbe essere

¹ Negli anni Novanta anche lo *Statuto delle studentesse e degli studenti* (DPR n. 249 del 24 giugno 1998, riformato con DPR del 21 novembre 2007 n. 235) che ha recepito i cambiamenti pedagogico-educativi e organizzativi che hanno interessato la scuola, l'ha definita come «una comunità di dialogo, di ricerca, di esperienza sociale, informata ai valori democratici e volta alla crescita della persona in tutte le sue dimensioni. In essa ognuno, con pari dignità e nella diversità dei ruoli, opera per garantire la formazione alla cittadinanza, la realizzazione del diritto allo studio, lo sviluppo delle potenzialità di ciascuno e il recupero delle situazioni di svantaggio, in armonia con i principi sanciti dalla Costituzione e dalla Convenzione internazionale sui diritti dell'infanzia fatta a New York il 20 novembre 1989 e con i principi generali dell'ordinamento italiano».

² D.P.R. 8 marzo 1999, n. 275, *Regolamento recante norme in materia di autonomia delle istituzioni scolastiche*, ai sensi dell'art. 21 della legge 15 marzo 1997, n. 59, *Delega al Governo per il conferimento di funzioni e compiti alle regioni ed enti locali, per la Riforma della Pubblica Amministrazione e per la semplificazione amministrativa*.

³ Uno dei primi studi significativi sulla dirigenza scolastica è stato il volume *Da maestri a dirigenti scolastici* nel quale il gruppo degli storici dell'educazione di Padova ha indagato i cambiamenti della funzione direttiva nella vita reale della scuola partendo da una fonte storica originale: le relazioni consegnate negli anni Cinquanta e Sessanta come prove d'esame dell'insegnamento di Pedagogia dagli studenti del Corso di Vigilanza scolastica. Gli iscritti, maestri in servizio che aspiravano a diventare direttori didattici, dovevano elaborare una tesina dal titolo *La mia scuola: cenni storici e problemi didattici*. Cfr. G. Zago (ed.), *Da maestri a direttori didattici. Esperienze scolastiche e di formazione universitaria nel Veneto del dopoguerra*, Lecce, PensaMultimedia, 2007. Per un'ampia e dettagliata panoramica sulla formazione e sul ruolo della dirigenza nella scuola italiana si veda, all'interno del volume, il contributo di G. Zago, *La formazione dei direttori didattici e il corso di vigilanza scolastica a Padova negli anni Cinquanta e Sessanta* (pp. 413-470).

interessante in futuro mettere a confronto la rappresentazione del direttore didattico che pongono le diverse riviste.

Sono stati presi in considerazione gli articoli dedicati al direttore e alla funzione direttiva: sono piuttosto scarsi fino agli anni Cinquanta e diventano più frequenti a partire dall'inizio degli anni Sessanta. Sono stati anche esaminati i necrologi, contenuti nella rubrica *Resurgent*, nei quali spesso si traccia il ritratto della persona e del professionista⁴. I necrologi sono presenti in buona quantità, ma il contenuto e il tono con il quale vengono scritti mutano nel tempo.

Lo spoglio, l'analisi e la scelta degli articoli sono stati realizzati per comprendere quali fossero la reale funzione del direttore, e soprattutto la rappresentazione che di quel ruolo si voleva veicolare. Inoltre, si è fatto un lavoro di scrematura dei necrologi più interessanti dal punto di vista storiografico: si è quindi voluto indagare la memoria collettiva⁵ di questi uomini di scuola e la rappresentazione che si voleva far giungere a tutti i maestri e le maestre abbonati alla rivista.

«Scuola Italiana Moderna», nei decenni esaminati, disegna una figura di direttore didattico che è in continuità con il passato, anche se in quegli anni si cerca di veicolare una rappresentazione del direttore che da uomo che esercita una speciale 'missione' come guida, perché «Maestro dei maestri», lo porti ad essere, come auspica anche l'area cattolica della pedagogia italiana⁶, una figura dirigente che abbia una maggiore preparazione culturale e pedagogica. La rivista, in un'ottica più moderna ed aderente ai cambiamenti sociali, propone che egli possa valorizzare i propri collaboratori e assegnare loro alcune specifiche funzioni.

I pedagogisti di area cattolica nel 1954 danno vita anche a *Scholé*, un Centro di ricerca e di Studi d'ispirazione cristiana. La Rivista nel 1962 – in un fascicolo speciale nel quale presenta le attività pedagogiche, culturali e editoriali

⁴ Sull'uso del necrologio come fonte storiografica si veda A. Ascenzi, R. Sani, «*Oscuri martiri, eroi del dovere*». Memoria e celebrazione del maestro elementare attraverso i necrologi pubblicati sulle riviste didattiche e magistrali nel primo secolo dell'Italia unita (1861-1961), Milano, FrancoAngeli, 2016.

⁵ «La memoria scolastica collettiva consiste nelle molteplici rappresentazioni che, nel corso del tempo, della scuola, degli insegnanti e delle stesse scolaresche ha offerto l'industria culturale (letteratura, cinema, televisione, arte...) e il mondo dell'informazione», <<https://www.memoria-scolastica.it/memoria-collettiva>> (ultimo accesso: 31.07.2024). Si veda anche J. Meda, R. Sani (edd.), *The School and Its Many Pasts III: Collective Memories of School*, <<https://www.memoriascolastica.it/le-nostre-pubblicazioni>> (ultimo accesso: 31.07.2024).

⁶ Sullo sviluppo della pedagogia cattolica nel dopoguerra si veda G. Zago, *Itinerari e proposte di rinnovamento pedagogico e culturale nel sistema formativo italiano nel secondo dopoguerra: l'area cattolica*, in A. Ascenzi, R. Sani (edd.), *L'innovazione pedagogica e didattica nel sistema formativo italiano dall'unità al secondo dopoguerra*, Roma, Studium, 2022, pp. 372-400.

de «La Scuola» – presenta il Centro come propulsore della pedagogia cattolica attraverso iniziative editoriali e altre attività educative⁷.

Nella pagina successiva è riprodotta una foto nella quale, oltre ai pedagogisti membri del Comitato direttivo Aldo Agazzi, Fausto M. Buongioanni, Pietro Braidò, Giovanni Calò, Mario Casotti, Giuseppe Flores d'Arcais e Gesualdo Nosengo, compare anche Luigi Stefanini. Alcuni di questi pedagogisti collaborano con la Rivista e firmano gli articoli più prestigiosi e di contenuto pedagogico che si allontanano sempre più dalle teorie neoidealistiche di Giovanni Gentile in favore di un rinnovato spiritualismo cristiano: anche se il linguaggio a volte richiama l'attualismo gentiliano o la didattica viva di Lombardo Radice – ad esempio la parola «anima» – spesso è riconducibile a espressioni che fanno parte della tradizione cattolica, ripresa e rivitalizzata da questa parte della pedagogia italiana.

La redazione di «Scuola Italiana Moderna» rispecchia questa rilettura della pedagogia neoidealistica di Lombardo Radice secondo un'interpretazione cristiana e, pur mantenendo l'aspetto più tecnico e organizzativo della proposta del pedagogista siciliano, ne sposa solo in parte i presupposti teorici.

2. *La funzione direttiva dalla fine degli anni Quaranta alla metà degli anni Cinquanta tra tradizione e innovazione*

I primi articoli significativi sui direttori didattici cominciano ad apparire sulla Rivista alla fine degli anni Quaranta e nei primissimi anni Cinquanta e riguardano soprattutto i concorsi e le loro modalità di espletamento⁸.

⁷ «Sorto nel 1954, presso 'La Scuola', *Scholé*, 'Centro di studi pedagogici fra docenti cristiani' intende promuovere l'unificazione delle forze della pedagogia cristiana in Italia, al fine di determinare un sempre maggior incremento scientifico e una sempre più efficace influenza nel mondo della cultura e della scuola italiana del pensiero educativo cristiano. A tal fine promuove l'organizzazione e lo svolgimento di incontri-convegni di studio – la cui partecipazione è riservata ai soli docenti universitari – e cura iniziative editoriali e altre attività atte al raggiungimento delle finalità previste dall'istruzione. [...]. Documentazione della fervida attività dei convegni annuali di studio, ai quali parteciparono anche illustri docenti universitari stranieri e, di volta in volta, specialisti delle varie discipline, è la ricca serie dei volumi degli Atti». «Scuola Italiana Moderna», vol. LXII, n. 20, IV fascicolo speciale, 1962, pp. 18-19. A p. 19 sono elencati i Convegni già svolti che hanno avuto come tema *La pedagogia cristiana, L'attivismo pedagogico, La sperimentazione in pedagogia, Metodologia e didattica, L'educazione estetica, L'educazione scientifica, L'educazione sociale*. Si annuncia anche il Convegno sul tema *Laicità e scuola* che avrà tre sottotemi: *Laicità e laicismo, Educazione religiosa e libertà dello spirito, Laicità, libertà e scuola*. Su *Scholé* cfr. anche E. Scaglia, *Giovanni Calò. Nella pedagogia italiana del '900*, Brescia, La Scuola, 2013, pp. 275-278.

⁸ Nel R.D. n 118 del 15 febbraio 1894 si erano stabilite le modalità degli esami di idoneità per l'ufficio di ispettore scolastico, e all'art. 9 si disponeva che coloro i quali avessero superato l'esame avrebbero conseguito il certificato di abilitazione all'ufficio di ispettore scolastico e che

Il problema sul quale si dibatte è quale debba essere la preparazione di coloro che vogliono diventare direttori: gli aspiranti a questa funzione sono semplici maestri, o maestri che hanno già esercitato il ruolo direttivo come «incaricati»⁹, ma ciò che li accomuna sembra essere una carenza di formazione. La rivista lascia trapelare il problema che sta alla base dell'espletamento delle pratiche concorsuali: ci si chiede se il fatto di essere stati maestri e conoscere la scuola è veramente il titolo più qualificante per un direttore.

Il modello che ancora traspare in questo periodo è quello che era stato sostenuto e diffuso da Lombardo Radice¹⁰, anche se in realtà ci si rende conto che ci vorrebbe qualcosa di diverso dal passato. La funzione del direttore rimane prettamente didattica e gerarchica, tanto che egli esprime le valutazioni annuali sui maestri¹¹ e queste incidono sulla valutazione dei titoli nei concorsi.

tale certificato sarebbe stata anche titolo di preferenza per la nomina a direttore didattico delle scuole elementari. (R. Moro, *La direzione didattica nella legislazione scolastica italiana dal 1859 ad oggi*, Brescia, La Scuola, 1952, p. 13).

⁹ Gli «incaricati» erano coloro che, pur non avendo il titolo, esercitavano la funzione direttiva. Nel Regolamento Unico per l'istruzione elementare, R.D. n. 5292 del 16 febbraio 1888, si dà mandato ai municipi di istituire «la direzione didattica delle loro scuole a persone giudicate idonee a tale ufficio, e preferibilmente a chi abbia già insegnato o dato prova di capacità nell'amministrazione scolastica». *Ibid.*, p. 11. Il successivo Regolamento generale del 9 ottobre 1895 stabiliva che «la direzione delle scuole deve essere affidata a persona fornita della patente di grado superiore e che abbia lodevolmente insegnato nelle scuole elementari pubbliche per almeno otto anni, e preferibilmente a coloro che posseggano l'attestato di idoneità all'ufficio di regio ispettore scolastico o di direttore didattico». Alla lettera g) si stabiliva che «nei comuni rurali scarsi di entrate e con poche scuole da sorvegliare, la direzione può essere affidata con equo compenso al maestro che insegna nella scuola o classe di grado più elevato, purché sia provveduto di diploma di grado superiore». *Ibid.*, p. 16. La Legge Nasi n. 45 del 19 febbraio 1903 decretava infine che «nessuno potrà essere nominato direttore didattico, neppure per incarico, se non ha insegnato lodevolmente almeno cinque anni in una scuola elementare pubblica inferiore o superiore. Il diploma di direttore didattico si conferisce per titoli ed esame». *Ibid.*, p. 23. Il Decreto n. 771 del 27 aprile 1919 istituisce le Direzioni Didattiche in numero non minore di 2000 in altrettanti comuni e la circolare n. 51 del 22 settembre 1920 stabilisce che le Direzioni prive di titolare potevano essere date ad incarico o ad un effettivo titolare della direzione vicina e limitrofa, oppure ad un insegnante locale effettivo di ruolo, fornito possibilmente del diploma di direttore didattico. *Ibid.*, p. 51.

¹⁰ Lombardo Radice scrive è compito del direttore conoscere, incitare e correggere gli insegnanti, essere per loro come un padre, visitare le classi per conoscere l'anima dell'insegnante e gli scolari, essere esempio di governo illuminato della scuola, interpretare leggi e programmi collaborando con i maestri. Cfr. G. Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, Palermo, Sandron, 1936¹⁶ (1913), pp. 45-46. Si veda sull'argomento G. Zago, *The figure of the elementary teacher and headmaster in the thought of Giuseppe Lombardo Radice*, in E. Scaglia (ed.), *Giuseppe Lombardo Radice in the early 20th century A rediscovery of his pedagogy*, Berlin, Peter Lang, 2023 pp. 95-107; E. Scaglia (ed.), *Una pedagogia dell'ascesa. Giuseppe Lombardo Radice e il suo tempo*, Roma, Studium, 2021.

¹¹ Cfr. M. Mattei, *Il giudizio annuale sul maestro*, Brescia, La Scuola, 1959. Nell'*Introduzione* al volume si legge: «Nel presente studio ci occuperemo del giudizio annuale: di quel giudizio che, ad ogni fine vol., viene dato sul maestro. Tale giudizio, come ogni giudizio sul comportamento, sulle capacità e sul rendimento, non può ovviamente essere dato se non da chi abbia la necessaria competenza e si sia trovato nelle condizioni di potersi procurare gli elementi necessari

L'Italia però, giovane stato democratico, ha bisogno di una scuola che vada in un'altra direzione guidata da direttori che sappiano espletare anche funzioni tecniche e amministrative¹².

La scuola reale e i suoi direttori non sempre concordano con questa visione e sembrano cogliere solo a tratti questa esigenza.

Così all'inizio degli anni Cinquanta il Direttore Tersilio Valenti di Reggio Calabria chiede l'aumento dei posti mantenendo una visione tradizionale della funzione didattica del direttore, ma anche cogliendo una 'crisi' organizzativa propria di quel tempo. Segnala troppe classi che non permettono l'espletarsi della funzione tradizionale di guida ai maestri.

È un fatto che da quando si abbandonò la via maestra che per la funzione direttiva veniva tracciata dalla legge Nasi del 1903 l'istituto della direzione didattica veniva man mano decadendo sino all'attuale situazione che, per unanime consenso degli uomini di scuola è addirittura catastrofica [...]. Ora dato che per mettere il direttore in condizione di poter funzionare bisognerebbe che avesse alle sue dipendenze non più di 50 classi, ne deriva che l'attuale organico di circa duemila direttori dovrebbe essere aumentato di almeno altre mille unità¹³.

Dopo aver rilevato la carenza di personale direttivo e tutte le difficoltà nell'espletare una funzione direttiva che sia anche didattica, Valenti conclude invocando criteri di valutazione che non siano solo legati ai titoli posseduti: «Credo sia inutile dover rilevare che bisognerà scegliere il personale direttivo fra i migliori, senza lasciarsi tentare da influenze esterne e che finora l'unica garanzia di serietà è data dal concorso per titoli ed esami, là ove i titoli giochino come preferenza a favore dei candidati a pari merito. Carità di Patria vuole che non si parli dell'attuale concorso direttivo»¹⁴.

per esprimerlo. Appunto in considerazione di ciò la nostra legge demanda la competenza ad esprimere il giudizio annuale sul maestro agli stessi organi cui è affidato il compito di dirigere e sorvegliare la sua attività», p. 6. Le voci da compilare per il Rapporto informativo erano le seguenti: qualità morali e intellettuali, cultura generale e preparazione professionale, consuetudine e attività di studio, eventuali pubblicazioni, partecipazione alla vita della scuola, comportamento nella scuola e fuori, assiduità, lodi – benemerenze e punizioni disciplinari, obbligo di residenza, attività didattica, azione educativa e disciplinare, rendimento, profilo dell'insegnante e giudizio complessivo. Mattei firma anche numerosi articoli in «Scuola Italiana Moderna», prevalentemente a carattere giuridico-esplicativo.

¹² Nel D.P.R. n. 417 del 31 maggio 1974 *Norme sullo stato giuridico del personale docente, direttivo ed ispettivo della scuola materna, elementare, secondaria ed artistica dello Stato*, all'art. 3 *Funzione docente, direttiva, ispettiva*, la funzione direttiva viene così definita: «Il personale direttivo assolve alla funzione di promozione e di coordinamento delle attività di circolo o di istituto; a tal fine presiede alla gestione unitaria di dette istituzioni, assicura l'esecuzione delle deliberazioni degli organi collegiali ed esercita le specifiche funzioni di ordine amministrativo, escluse le competenze di carattere contabile, di ragioneria e di economato che non implicino assunzione di responsabilità proprie delle funzioni di ordine amministrativo».

¹³ T. Valenti, *Sulla crisi della direzione didattica*, «Scuola Italiana Moderna», vol. XXII, n. 3, 1952, p. 35.

¹⁴ *Ibid.*

Nell'articolo *La funzione direttiva oggi* di Gian Cesare Pico¹⁵, il direttore, dimostrando di non cogliere a pieno il problema della scarsa formazione dei maestri aspiranti direttori, afferma che si deve valorizzare il diploma favorendo l'autodidattica: «la carriera deve essere aperta a tutti i maestri, con particolare riguardo a quelli che operano nelle zone rurali meno ospitali. Si sbarri il passo ai soliti privilegiati che possono frequentare i corsi universitari e giungono ad afferrare, con pochi meriti professionali, la sedia direttoriale»¹⁶. Sembra che per Pico lo studio e la preparazione non valgano molto se paragonati all'esperienza ed egli continua riproponendo il vecchio modello del direttore, e anche dell'ispettore, come «Maestro dei maestri».

Il direttore esprime una posizione più moderna quando motiva la necessità di aumentare i quadri direttivi auspicando la collaborazione non solo con i maestri, ma anche con le forze sociali vicine alla scuola scrivendo: «in questo rafforzamento e ampliamento della funzione direttiva che le presenti condizioni sociali impongono, il direttore ha bisogno di avere intorno forze operanti intraprendenti dei bisogni locali come si addice al regime democratico quindi il fiancheggiamento di un consiglio di direzione di non molte persone che rappresentano il comune, il corpo insegnante e il Patronato scolastico»¹⁷.

Gian Carlo Sottili – un direttore didattico e uomo di scuola molto apprezzato – cerca così una soluzione al problema della scarsa formazione dei direttori che partecipano ai concorsi:

La triste esperienza di questi concorsi dovrebbe tuttavia portare ad una logica conclusione: finora non c'è stato concorso direttivo che non sia stato bandito sulla scorta di leggi o leggine, le quali non abbiano modificato le norme generali vigenti all'atto del bando, sia per quanto riguarda le prove d'esame, sia per quanto riguarda le riserve di posti a favore di determinate categorie. L'interesse della Amministrazione, anzi della Scuola, ha sempre ceduto il passo, di fronte ad interessi particolari: è auspicabile che le Autorità responsabili o gli organismi sindacali si facciano promotori di un provvedimento di legge inteso a normalizzare una situazione che rischia di aggrovigliarsi sempre di più per l'estendersi e il consolidarsi di interessi creati. Un disegno di legge che, in un articolo unico, stabilisse il principio che tutti i futuri concorsi a posti di direttore didattico dovranno essere espletati per esami e titoli e, in considerazione della continuità che si è venuta determinando tra la carriera del maestro e quella del direttore, non possono a tali concorsi applicarsi le dispo-

¹⁵ Gian Cesare Pico (1882-1971), maestro e direttore didattico, fondò con altri studiosi fondò la Rivista «La Nostra scuola», nella quale perseguì vivacemente l'opera di rinnovamento scolastico, volta specialmente ad elevare la cultura e la figura del maestro. Accanto all'attività di direttore didattico dal 1929 al 1949 nelle scuole di via Alfieri e via Giusti a Milano, svolse un'intensa attività giornalistica ed editoriale. Collaborò a quotidiani e riviste professionali, fu autore di testi scolastici per le scuole elementari, festive e serali e scrittore per l'infanzia. Terminò la carriera con la nomina a ispettore scolastico. Si veda L. Lombardi, *Pico Gian Cesare*, in G. Chiosso, R. Sani, (edd.), *Dizionario Biografico dell'educazione (1800-2000)*, Milano, Editrice Bibliografica, 2014, Voll. II, pp. 336-337.

¹⁶ G.C. Pico, *La funzione direttiva oggi*, «Scuola Italiana Moderna», vol. XXII, n. 3, 1952, p. 13.

¹⁷ *Ibid.*

sizioni relative per le assunzioni nei gradi iniziali delle carriere (riserve e precedenza varie), come d'altra parte avviene per tutti gli esami di promozione per qualunque altra carriera degli impiegati statali, eliminerebbe in radice ogni possibilità di richiesta di trattamento di favore, giustificata o no dalle varie circostanze¹⁸.

In quasi tutti gli articoli dedicati alla funzione direttiva ed ispettiva le doti che vengono richiamate sono la rettitudine, la nobiltà d'animo e la disponibilità a lavorare con dedizione e impegno per la scuola, gli alunni e i maestri. Il direttore viene rappresentato come colui che, animato da operosità e generosità e sorretto da un equilibrato entusiasmo, svolge la sua funzione facendo tesoro dell'esperienza accumulata anche nel ruolo subalterno di maestro.

3. *La rappresentazione del direttore nella memoria collettiva: la rubrica Resurgent*

I necrologi, preziosa fonte per una nuova storia della scuola, contenuti nella rubrica *Resurgent* della Rivista confermano il modello di direzione appena tracciato che pone in evidenza il dovere svolto in maniera esemplare, il carattere e la dedizione al lavoro a favore della costruzione della scuola statale.

Si riportano, come esempio, alcuni necrologi nei quali si ricorda il direttore: rettitudine, operosità, senso del dovere ed anche impegno per le rivendicazioni sindacali sono le doti umane che maggiormente risaltano nel ricordo e le caratteristiche poste in evidenza. Queste ultime accomunano coloro che hanno ruoli dirigenziali nella scuola, tanto che anche l'ispettore scolastico Paolo Maldini di Asti, viene ricordato nel necrologio così: «dotato di viva intelligenza, di alto senso del dovere e di una varia cultura didattica ed umanistica, recò negli uffici a cui era preposto, il contributo notevole della sua fervida e appassionata opera. Figura indimenticabile di educatore, fervente cristiano, lascia con il più profondo rimpianto i tesori del suo cuore nobile e generoso»¹⁹. In modo simile viene ricordato anche un altro direttore: «dott. Gerlando Salomone, Direttore del 71 circolo (Roma) una delle figure più note e più apprezzate nel nostro ambiente magistrale per la sua rettitudine e per lo spirito tenacemente battagliero che lo portò a capeggiare il movimento per una carriera più dignitosa e remunerativa»²⁰. Anche in altri necrologi i direttori vengono ricordati per la loro opera di educatori, e per aver profuso quelli che vengono definiti come tesori di intelligenza e impareggiabile rettitudine.

A volte non manca una certa retorica che fatica a staccarsi da ideali edu-

¹⁸ G.C. Sottili, *Sui concorsi direttivi*, «Scuola Italiana Moderna», vol. XXIII, n. 19, 1953, p. 56.

¹⁹ *Resurgent*, «Scuola Italiana Moderna», vol. XX, n. 18, 1950, p. 49.

²⁰ *Resurgent*, «Scuola Italiana Moderna», vol. XX, n. 20, 1950, p. 84.

cativi che hanno caratterizzato il periodo storico precedente, come quando si richiamano l'attività, lo spirito di iniziativa e la comprensione del valore di una scuola che concorre a preparare il domani sempre più radioso della Patria.

Dato l'orientamento della Rivista, spesso si ricorda anche, come valore aggiunto alle doti umane, la fede. Ad esempio appare questo necrologio di un'anziana direttrice didattica che aveva operato negli anni Venti, ma che la Rivista ritiene di poter ricordare: «a Milano si spegneva la sig. Giannina Bosoni, terziaria francescana: Direttrice didattica in pensione dal 1927-1928. La sua vasta e profonda cultura religiosa, ella seppe far rivivere in quanti l'accostavano, e sempre seppe trarre dalla sua Fede, vero abbandono a Dio, quella forza che la sorresse nelle ore di difficili e dolorose»²¹. Anche un direttore viene ricordato, con un linguaggio che richiama quello religioso, come «apostolo della scuola».

Non mancano necrologi nei quali si ricordano anche le benemeritenze ottenute, come nel caso di Antonio Bettioli, che nel 1950 viene commemorato come emerito direttore di Scuola Cittadina a Trieste, insignito del Medaglia d'oro dei benemeriti dell'Istruzione.

Tra i necrologi ci sono anche quelli delle direttrici didattiche, donne che rappresentano ancora un'eccezione nel panorama della scuola del tempo e spesso vengono ricordate per le loro doti personali, più che per quelle professionali.

Dai necrologi e dagli articoli dedicati ai dirigenti si conferma, nella memoria collettiva, una grande importanza data al lavoro educativo, concepito come 'missione' al pari di quello dell'insegnante in questo momento storico. In questo primo periodo il modello del direttore, nonostante la crisi, richiama ancora molto quello stabilito da Lombardo Radice: l'uomo colto, religioso e di costumi morigerati, capace di diventare «Maestri dei maestri».

4. La funzione direttiva dal 1955 alla metà degli anni Sessanta: un nuovo direttore per una scuola che cambia

A partire dalla metà degli anni Cinquanta la Rivista comincia a pubblicare articoli, che diventeranno sempre più frequenti negli anni Sessanta, nei quali si sostiene che alla funzione direttiva necessita una maggiore preparazione culturale e professionale. Questa riflessione è ribadita anche dalle pagine che, dando notizia dei concorsi direttivi, offrono strumenti e riferimenti bibliografici per la preparazione alle prove di concorso. Il programma stabilito prevede molte discipline che fanno da corollario alla pedagogia e si articolano in pedagogia e filosofia, pedagogia e didattica, psicologia, sociologia e scuola, legislazione scolastica della scuola elementare. Si reclamizza anche un manuale

²¹ *Resurgent*, «Scuola Italiana Moderna», vol. XXI, n. 7, 1951, p. 26.

di legislazione scolastica che viene definito come prezioso strumento di lavoro per il personale direttivo della scuola. A metà anni Cinquanta il programma di concorso è ben esplicitato e si consigliano i volumi da studiare per la storia della filosofia²². Negli anni Sessanta la bibliografia si amplia fino a comprendere le opere dei maggiori studiosi e professori universitari dell'epoca: Flores d'Arcais, Casotti, Calò, Gambaro, Catalfamo, Corallo, Agosti e altri²³.

La necessità di nuovi direttori esiste realmente: la Rivista in aprile dà notizia di un imminente concorso direttivo per 250 posti riservato ai direttori già incaricati: espletato questo concorso e altri due già in atto, resteranno ancora 250 direzioni didattiche coperte da incaricati. In quel momento le direzioni libere sono 835 su 2118, ma nei successivi tre anni sarebbero state istituite altre 1200 nuove direzioni didattiche, differenziando i numeri secondo le diverse esigenze locali²⁴.

Rimane però ancora in primo piano, la questione dell'identità del direttore, dalla quale dipende anche la formazione che dovrà avere. In questo periodo scrivono sulla Rivista molti direttori in servizio, alcuni più noti perché autori anche di qualche volume, altri meno conosciuti perché ancora giovani, ma tutti competenti nel loro ruolo.

In un articolo uno di questi direttori, Giuseppe Cencetti, afferma, in accordo con il modello che abbiamo visto, che «l'opera del direttore prende quella forma di superiore magistero che crea già nel rapporto direttore-maestro il presupposto di una scuola formativa»²⁵ e racconta una sua visita ad una scuola: quando la maestra, che ha scelto di fare scuola all'aperto, e le mamme

²² Nel numero 14 di «Scuola Italiana Moderna», del 1955 si indica e si approfondisce la biografia di storia della filosofia perché si ritiene che non verrà eliminata, inoltre si pensa che «rifarsi allo studio di questa sia la più eccellente propedeutica alla preparazione ulteriore, ivi compresa quella ordinaria alla prova scritta». La bibliografia è suddivisa in preliminare, studio approfondito, lettura diretta delle opere e segue poi l'articolazione del programma (Umanesimo e Rinascimento, Criticismo, pensiero contemporaneo). «Scuola Italiana Moderna» vol. LXIV, 1955, p. 58. Nel n. 18 dello stesso vol. a p. 58 viene indicata la bibliografia estesa sul Criticismo che comprende studi comparativi sul pensiero di Kant rispetto a filosofi antichi e moderni.

²³ Nel numero 3 del 1963 si trovano le *Prime indicazioni bibliografiche per la preparazione alla prova scritta* nelle quali ci sono indicati molti volumi dei maggiori pedagogisti dell'epoca, anche stranieri come Planchard, Willmann, Schneider.

²⁴ Si veda G. Marchese, *Aria nuova alla Direzione generale. Il "Piano" - I nuovi Programmi - 1200 nuove Direzioni Didattiche*, «Scuola Italiana Moderna», vol. LXIV, n. 21, 1955, p. 6. Marchese nell'articolo mette in evidenza lo scollamento tra il Ministero e la scuola reale: «Il Ministero della P.I., anche ma non solo per quanto riguarda la Direzione Generale della scuola elementare, soffre da sempre di centralismo e di uniformismo. Le due cose sono, in verità, una sola che può essere indicata anche come 'burocratismo': il Ministero se ne sta per conto suo, c'è soluzione di continuità tra i suoi Uffici e la scuola viva, le sue disposizioni sono uniformi in ogni parte d'Italia ed obbediscono in via primaria ai criteri dell'uguaglianza e dell'equa distribuzione. Per questa via si ottengono livellamenti che richiamano il concetto di morte, non quello di vita».

²⁵ G. Cencetti, *Dialoghi di collaborazione*, «Scuola Italiana Moderna», vol. LXII, n. 1-2, 1962, p. 23.

presenti alla lezione lo vedono comparire si preoccupano, ma poi la visita si svolge tranquillamente. Cencetti scrive:

Quella maestra non aveva capito dai miei «orientamenti» come intendo la funzione del direttore. Io penso debba trattarsi di un collaboratore, di un collega amico della scuola, di un educatore che desidera porgere la sua lunga e provata esperienza. La «visita» quindi, dovrebbe rappresentare un conforto ed una soddisfazione ed io desidero essere accolto come un buon amico che sa vedere le vostre difficoltà, che sa apprezzare le vostre fatiche, che sa valutare i vostri successi, che vuole studiare con voi le vostre incertezze e seguire le vostre esperienze, incoraggiarvi negli insuccessi e qualcuno di voi può darmi atto che così, ho fatto quando ho trovato stanchezza e sconforto.

Poi, con qualche richiamo nel linguaggio al neoidealismo gentiliano, il direttore aggiunge: «mai, il direttore si presenterà come un'imposizione dei suoi pensieri che se non saranno da voi intimamente accettati resteranno inutili al vostro lavoro così intimo e personale. Tutto nella scuola è interiore ed un direttore appena appena cosciente non può dimenticarlo: non può pretendere che i maestri operino in un certo modo coi propri alunni ed operi lui, con loro, in tutt'altra maniera».

Il direttore, quindi, ricalca ancora la funzione che ha sempre avuto: è il «Maestro dei maestri», il loro amico e la loro guida, anche se rimane gerarchicamente superiore. Cencetti infatti, pur esprimendo una posizione di benevolenza e rispetto nei riguardi dei maestri, non manca di aggiungere:

Tuttavia, il direttore didattico, è costretto ad esplicitare un'attività burocratica di controllo. L'organizzazione educativa che pone al culmine dei suoi valori l'alunno ed il maestro, ed al fondo il ministero della P. I. assume necessariamente anche un aspetto legale: una catena gerarchica, da Ministro all'alunno, allo scopo di attuare le esigenze stabilite dalla Legge. In questo secondo aspetto voi sapete che occorre ubbidire alle disposizioni dei superiori. Ma anche in questo caso, conoscendo i doveri saprete evitarmi la necessità di interventi particolarmente spinosi per il nostro ambiente e per il mio temperamento²⁶.

Nei primi anni Sessanta la gerarchia scolastica comincia ad essere messa in discussione nelle pagine della Rivista, nel senso, ad esempio, di esigere una maggiore competenza nel formulare i giudizi: nel 1962 e nel 1963, si trovano pagine che spiegano ai maestri come ricorrere contro il giudizio annuale del Direttore che riguarda «gli aspetti della personalità» del maestro che sono indicati dalla legge²⁷.

Nel 1963 in un articolo sulla formazione dei direttori la posizione della Rivista si chiarisce: si auspica ancora la riduzione dell'estensione territoriale dei

²⁶ *Ibid.*

²⁷ L'autore di questi articoli è Marco Mattei, già citato per il suo volumetto sul giudizio annuale sul maestro. M. Mattei, *Il ricorso contro il giudizio annuale*, «Scuola Italiana Moderna», vol. LXXI, n. 2, p. 7; *Legislazione scolastica. Le note di qualifica degli insegnanti: 13. Il ricorso contro le note di qualifica*, «Scuola Italiana Moderna», vol. LXXIII, n. 2, 1963, p. 81.

Circoli didattici e un miglioramento del rapporto numerico direttore-maestro, ma poi si afferma che

il dirigente di scuola primaria dovrà in futuro provenire da una formazione universitaria, preferibilmente da un corso di laurea in pedagogia o affine: gli attuali Corsi in vigilanza scolastica sono ormai inadeguati e, in pratica, trascurati dagli stessi giovani. Anche i concorsi direttivi, come in genere tutti i concorsi per la scelta degli insegnanti e dirigenti scolastici, richiedono una nuova caratterizzazione, come prova di valutazione attitudinale alla funzione, concepita come attività soprattutto educativa, didattica e organizzativa²⁸.

La funzione perciò sta cambiando, ma la scuola va sempre difesa così come il ruolo del direttore: questo giustifica anche il breve ma incisivo trafiletto che definisce il libro *Il maestro di Vigevano* e il film di Petri tratto dal volume²⁹, come il tentativo di «stritolare la scuola di Stato», un modo per risolvere cinematograficamente la questione scolastica «salvando i doveri dell'intelligenza: appunto farne una pagliacciata, una farsa divagatoria, incoerente e clownesca». Il film ridicolizza la scuola e il direttore e questo non è ammissibile.

La posizione di coloro che vogliono maggiore formazione è ribadita anche nel 1964 in un articolo nel quale si ricorda, in merito ai favoritismi fatti verso agli incaricati, che l'ingresso nella scuola di giovani preparati sul piano culturale è da preferirsi e dà maggiore dignità alla funzione direttiva³⁰.

L'anno successivo si prospetta nelle pagine della Rivista la necessità di un vero e proprio ufficio di direzione con un maestro distaccato per funzioni burocratiche-contabili e di un affiancamento del direttore da parte di un organo collegiale democratico di autogoverno della scuola³¹. Questo comporta però anche rivendicazioni economiche e giuridiche da parte della classe dirigente

²⁸ *Formazione, scuola e aggiornamento del personale insegnante, direttivo, ispettivo e non insegnante*, «Scuola Italiana Moderna», vol. LXXIII, n. 6, 1963, p. 34.

²⁹ *Il maestro di Vigevano*, «Scuola Italiana Moderna», vol. LXXIV n. 9, 1965, p. 94. Il film di Petri era tratto dal volume di Lucio Mastronardi, *Il maestro di Vigevano*, Torino, Einaudi, 1962.

³⁰ «Ogni discriminazione o favoritismo di gruppi offende il senso di giustizia e di rispetto che si deve a tutta la classe magistrale, a tutti gli aspiranti alla direzione didattica. Operando una selezione d'impegno, si contribuisce a dare maggior dignità alla funzione direttiva, si favorisce l'ingresso, in condizioni di uguaglianza, degli elementi giovani, ben preparati sul piano culturale, animati da slancio operativo». E. Lucchini, *Gli idonei, gli incaricati e i giovani*, «Scuola Italiana Moderna», vol. LXIII, n. 2, 1964, p. 88.

³¹ *Convegno di studio sul consiglio di direzione*, «Scuola Italiana Moderna»; vol. LXXIV, 1965, n. 15, p. 91. La rivista dà conto delle conclusioni a cui si è arrivati nell'ambito del Convegno di Studi svoltosi nei giorni 1 e 2 febbraio 1965 per iniziativa del Centro Didattico Nazionale per la scuola elementare. L'attenzione si è concentrata su tre problemi fondamentali: 1) presenza degli insegnanti nel governo della scuola 2) studio delle forme permanenti di contatto fra scuola, famiglia ed ambiente sociale e culturale 3) affiancamento al corpo insegnante di équipes di esperti (medici, psicologi, assistenti sociali). Il Consiglio di Direzione, eletto dal Collegio degli insegnanti, costituisce un organo consultivo e di proposta della Direzione didattica per tutto quanto concerne i problemi e le iniziative di carattere organizzativo, pedagogico, metodologico e didattico inerente la vita del Circolo.

che spiegano la partecipazione al sindacato di alcuni dirigenti che vedremo rispecchiata nei necrologi.

Il passaggio però non è sempre tranquillo: se la posizione della rivista appare ormai già chiara e rispecchia quella della pedagogia del tempo, la «scuola reale» oscilla ancora tra posizioni diverse. Nello stesso numero, infatti, un abbonato di Benevento difende i maestri non laureati che concorrono per i posti da direttori rivendicando che anche se non hanno il titolo di studio «hanno una preparazione culturale svolta in silenzio, insieme ad una conoscenza diretta e non riflessa della scuola» e, con echi ancora neoidealistici, l'abbonato afferma che «la scuola elementare ha una sua vita interna. In essa si muovono anime e non carte [...] per le suddette ragioni, quando la si vuole ammodernare, non bisogna partire dal di fuori, pretendendo dai candidati al concorso direttivo lauree 'più consistenti' condite con un po' di psicologia e metodologia', ma migliorando la cultura dei maestri, di quelli che rimangono a fare i maestri, punto allettati, come avviene per i laureati e i diplomati, da coefficienti superiori o da poltrone di comando».

L'abbonato poi esprime così la sua posizione a favore dei maestri che cambiano ruolo:

ad ogni modo il Direttore è necessario, ci deve essere, e deve essere didattico. Per essere tale è necessario che sia stato il più possibile nella scuola, che abbia dato buone prove di talento e di metodo personali; che sia stato il migliore maestro. Che sia laureato è meglio, ma non essenziale, perché, se ha una "consistente" laurea e poca esperienza, potrà dettare bei principi filosofici e metodologici, spesso irrealizzabili, potrà conoscere bene la legislazione scolastica, ma non la scuola che è ben altra cosa³².

La Rivista però ormai si muove su altri binari: pur non definendo del tutto un diverso modello di direzione ancora troppo complesso e lontano da attuare, si chiede un'alta preparazione culturale e pedagogica dei direttori. Così in alcuni numeri del 1964 si dà ampio spazio alla figura e alla funzione del direttore didattico e alla sua formazione culturale e professionale.

Per quanto riguarda la funzione Riccardo dal Piaz³³ scrive che nella scelta del personale dirigente lo Stato ha sempre richiesto attraverso i concorsi direttivi una sola dote, cioè la cultura generale e specifica e si è proceduto sotto l'influenza della formula gentiliana secondo la quale per insegnare basta sapere e che per dirigere hanno valore soltanto le doti di cultura. Ma, scrive il direttore,

³² Abbonato n. 45964-576827, *Concorsi direttivi e titoli accademici*, «Scuola Italiana Moderna», vol. LXIII, n. 5, 1964, p. 95.

³³ Riccardo Dal Piaz (1889-1968) è stato maestro, direttore ed ispettore in Trentino-Alto Adige e a Torino. Collaborò a numerosi periodici quali «Didattica fascista», «La Tecnica scolastica», «I Diritti della scuola», «L'Educazione nazionale», «Gli Annali dell'istruzione elementare». Cfr. Chiosso, Sani (edd.), *Dizionario Biografico dell'educazione (1800-2000)*, cit., Vol. I., p. 428.

le doti, pur rimanendo sempre fondamentali, non possono però da sole dare alla scuola il direttore ideale di cui ha bisogno. Tali doti devono essere accompagnate e integrate da altre effettive qualità attitudinali alla funzione direttiva, che sono quelle che hanno un valore determinante per il progresso della scuola, se non si vuole trasformare il direttore didattico [...] in un funzionario qualsiasi, declassato al deludente ruolo di semplice direttore burocratico³⁴.

Per evitare questo si deve procedere nei concorsi con una prova di cultura e una di valutazione attitudinale alla funzione concepita come attività educativa, didattica, organizzativa. Per chiarire la propria posizione Dal Piaz cita Casotti e la prolusione fatta dal professore al corso di preparazione per i direttori inaugurato all'Università cattolica il 3 novembre 1963, nella quale non mancano affermazioni circa l'identità del direttore che, pur mantenendo la tradizione, aggiungono capacità di riflessione e mediazione. Casotti infatti aveva detto: «il maestro dei maestri, ha superiorità non gerarchica ma per doti morali e spirituali, un uomo che sa pensare e studiare, porre problemi e incitare le anime a risolverli con la virtù dell'esempio, modello di pensiero e di azione, di carattere e di tatto e non dispotico amministratore»³⁵.

Così i corsi di Formazione culturale e professionale del direttore didattico, reclamizzati nella rivista, propongono i maggiori pedagogisti del tempo come relatori: Giuseppe Flores d'Arcais, Gaetano Santomauro, Diega Orlando, Giovanni Reale, Gabriele Calvi, Mario Mencarelli, Luigi Agazzi che in quel momento era direttore didattico a Bergamo³⁶.

La nuova proposta quindi, almeno in campo cattolico, non si disfa della tradizione, ma cerca di integrarla e modificarla adattandola alle nuove condizioni sociali, politiche, economiche e culturali.

Non tutti però sono d'accordo con il mantenimento, anche parziale, di vecchie tradizioni, infatti subito sotto l'articolo di Dal Piaz un lettore – C.G. ispettore scolastico a Reggio Emilia – rivendica per i direttori lo stesso trattamento giuridico ed economico riservato a ispettori e presidi. Una parte della scuola militante sembra affiancare in maniera battagliera e a volte anche sopravanzare le teorie dei pedagogisti.

Contemporaneamente la Rivista informa sui concorsi, sull'incremento dei posti e sulle leggi che regolano il ruolo³⁷ e in un articolo di Aldo Agazzi

³⁴ R. Dal Piaz, *Figura e funzione del direttore didattico*, «Scuola Italiana Moderna», vol. LXXIII, n. 13, 1964, pp. 6-7.

³⁵ *Ibid.*

³⁶ Cfr. *Formazione culturale e professionale del Direttore didattico*, «Scuola Italiana Moderna», vol. LXXIII, n. 18, 1964, p. 7. Si legge: «Scopo del Corso: aiutare i candidati agli esami orali del concorso in via di espletamento, nella preparazione di fondo (filosofica, pedagogica, giuridica). Il corso è strutturato sul programma del concorso direttivo, con adeguato rilievo dei problemi socio-economici e dei problemi scolastici».

³⁷ Nel n. 21 del 1964 a p. 84 si dà notizia dell'approvazione definitiva della legge sui concorsi e le nomine a direttore didattico; nel n. 9 del 1965 a p. 8 si scrive dei provvedimenti annunciati in

del 1965 si tracciano la figura e le funzioni dell'insegnante «capogruppo» o «fiduciario»³⁸. Anche se non prevista nella legislazione, a questa figura il direttore può affidare incarichi che consentano il buon andamento della scuola e il migliore svolgimento delle attività didattiche, così come l'incremento e la conservazione delle dotazioni della scuola. Il capogruppo, quindi, gode della fiducia del direttore ed è un suo collaboratore che viene definito «preziosissimo ed insostituibile». Si evidenzia quindi la bontà di una visione che prevede una gestione condivisa della scuola.

Nel 1965 «Scuola Italiana Moderna» riporta la notizia di un Convegno di studi sul Consiglio di direzione³⁹ riferendo che quasi tutti i partecipanti sono orientati verso una soluzione che risponda a tre esigenze: la presenza degli insegnanti nel governo della scuola; lo studio delle forme permanenti di contatto fra scuola, famiglia ed ambiente sociale e culturale; l'affiancamento al corpo insegnante di équipes di esperti medici, psicologi, assistenti sociali.

Per dare risposta a queste esigenze si chiede l'istituzione di un Collegio degli insegnanti in ogni circolo didattico che possa eleggere un Consiglio di Direzione: sono organi consultivi e di proposta della Direzione che forniscono orientamenti di carattere organizzativo e didattico da realizzarsi nel circolo. Il Consiglio è presieduto dal direttore e ne fanno parte anche rappresentanti dei genitori. L'équipe è un organo ausiliario a disposizione del direttore e degli insegnanti. Si delinea così sostanzialmente nelle pagine di «Scuola Italiana Moderna» ciò che diventerà legge circa una decina di anni dopo nel 1974 con i Decreti Delegati che istituiscono gli organi collegiali nella scuola italiana e con i quali la funzione direttiva muterà radicalmente.

Nel numero 17 dello stesso anno si annuncia un supplemento per i direttori nel quale vengono affrontati gli argomenti di viva attualità: ad esempio, Marco Agosti scrive *L'ora presente della scuola*, Giovacchino Petracchi *Il direttore didattico e i piani di lavoro dei maestri*; sul Consiglio di direzione scrivono Egidio Lucchini *Un invito all'autogoverno magistrale*, Mario Bertelli *Necessità al direttore la collaborazione dei maestri*, Mario Libardi *Collaborazione e collegialità*; sui posti maschili, femminili e misti scrivono Lino Monchieri, Rina Gioberti e Paolo Api-Frisoni; infine c'è anche la sezione *amministrazione e scuola*. Gli autori degli articoli sono direttori o ispettori che hanno una

ordine ai direttori didattici e agli ispettori scolastici e all'incremento dei circoli didattici. Inoltre, si dà conto del fatto che il Ministro propone di prendere in considerazione di affiancare al direttore e all'ispettore un organo democratico collegiale che assista i dirigenti nell'esercizio della loro funzione scolastica e costituisca una delle nuove e corrette forme di autogoverno della scuola. Nel numero 21 del 10 gennaio 1965, infine, si dà notizia del Concorso direttivo ordinario a 202 posti che prevede la presentazione delle domande entro il 13 febbraio 1965.

³⁸ A. Agazzi, *L'insegnante "capogruppo" o fiduciario*, «Scuola Italiana Moderna», vol. LXXIV, n. 16, 1965, p. 81.

³⁹ Si veda *Convegno di studi sul Consiglio di direzione*, «Scuola Italiana Moderna», vol. LXXIV, n. 15, 1965, p. 91.

cultura pedagogica e conoscono bene la scuola reale. Petracchi, ad esempio, qualche anno dopo scrive, insieme a Montuschi, un saggio sul direttore didattico⁴⁰. Nella *Introduzione* del volume gli autori scrivono che anche se negli anni non sono mancate pubblicazioni e incontri sul tema della personalità e delle funzioni del direttore didattico, non si è ancora delineata sufficientemente la fisionomia professionale del direttore «la cui personalità rimane avviluppata in una trama di ambivalenze e di contraddizioni che generano non poche perplessità nei maestri»⁴¹. Emerge fin da subito l'idea che è necessaria una certa predisposizione per svolgere questo lavoro, ma anche la difficoltà nel definirne i contorni professionali:

Il direttore didattico è insieme amico e giudice, consigliere e controllore, collaboratore e superiore del maestro. L'ambivalenza della personalità del direttore didattico raffrena anche l'impeto dei maestri più disponibili alla responsabile collaborazione. A chi spetta il diritto di giudicare non possono essere fatte conoscere le debolezze e le insufficienze dell'attività professionale: questo il convincimento che trattiene il maestro sulla soglia della franca e aperta collaborazione col superiore diretto⁴².

Si cerca così di risolvere il problema del comportamento e della funzione del dirigente scolastico convalidando la valutazione della sua personalità «con apporti di ricerche condotte scientificamente e di offrire, nel contempo, prospettive di attività che integrino le competenze stabilite dalla legge con le condizioni e le istanze della scuola di oggi»⁴³.

Anche nel numero 18 del 1966 è presente un supplemento-omaggio per gli ispettori scolastici e i direttori didattici che si apre con due articoli di Mario Mencarelli e dello stesso Petracchi.

La funzione direttiva espletata dalle donne non si discosta in questi decenni da quella dei colleghi uomini: non appaiono particolari doti o capacità ricon-

⁴⁰ F. Montuschi, G. Petracchi, *Il direttore didattico*, Brescia, La Scuola, 1968. Dieci anni più tardi anche Scurati, Damiano e Riboldi pubblicano un volume sui dirigenti affermando, in *Premessa*, che la funzione direttiva nella scuola è ancora un campo in gran parte inesplorato ma determinante per una corretta costruzione di un approccio critico e propositivo alle tematiche del cambiamento e dell'innovazione nella scuola. C. Scurati, E. Damiano, M. Riboldi, *La funzione dirigente nella scuola*, Brescia, La Scuola, 1978.

⁴¹ *Ibid.*, p. 5.

⁴² *Ibid.*

⁴³ *Ibid.* Gli autori auspicano poi uno sforzo congiunto di studiosi e uomini di scuola, attraverso la ricerca e l'impegno, l'approfondimento scientifico e la volontà di ben operare. La prima parte del volume, curata da Montuschi, ha come titolo *La personalità di base del direttore didattico*; la seconda, curata da Petracchi, titola *Prospettive operative della funzione direttiva* e comprende i capitoli *Compiti del direttore didattico in ordine al progresso educativo della scuola primaria*, *Relazioni umane all'interno della scuola*, *Carattere dell'intervento del direttore*, *La visita alla classe*, *La valutazione degli insegnanti*, *Compiti del direttore didattico per l'aggiornamento culturale e professionale degli insegnanti*, *Compiti del direttore didattico per la promozione della vita democratica nella scuola*, *Compiti del direttore didattico per la promozione dei rapporti fra scuola e comunità*.

ducibili ad una specificità di genere, se non quelle tradizionali, riconducibili anche alle maestre, della delicatezza d'animo e della sensibilità verso le istituzioni assistenziali. Così le poche direttrici, operose ed attive, magari anche premiate per le loro benemerienze, sono assimilate nella memoria collettiva a quella dei colleghi.

Faticosamente la funzione ma anche la rappresentazione pubblica al personale della scuola sta modificandosi e, seppur tra divisioni e posizioni differenti, teorie pedagogiche e scuola reale, il direttore sta diventando un funzionario pubblico dotato di cultura, ma anche di abilità organizzativa.

5. *La rappresentazione nella memoria collettiva: differenti necrologi*

I necrologi degli anni Sessanta riflettono il cambiamento avvenuto: si riferiscono alle qualità professionali dei direttori piuttosto che a quelle umane, citano onorificenze e benemerienze dovute al valido lavoro eseguito all'interno dell'istituzione scolastica, le doti messe in evidenza sono quelle culturali, organizzative e legate alle molteplici attività svolte.

Nel numero 2 del 1963 appare così il ricordo scritto dagli insegnanti di Treviso del direttore Giuseppe Godena ad un anno dalla morte:

Nato a Rovigno d'Istria (Pola), diplomato maestro giovanissimo, si distinse come ottimo educatore e fu altresì apprezzato corrispondente di giornali anche scolastici, come *Scuola Italiana Moderna*.[...] Studioso di problemi scolastici, con geniale e coraggioso spirito di iniziativa, profuse le sue energie in moltissimi campi: fu direttore del Centro di educazione artistica; uno dei membri più attivi, fin dalla fondazione del Consiglio diocesano dell'AIMC ricoprendo la carica di vice presidente diocesano e provinciale, fu direttore delle scuole reggimentali e carcerarie ed organizzatore instancabile di svariate manifestazioni culturali ed educative; conosceva la scuola e la viveva con l'aristocratico senso di un servizio. Il calore della persuasione stava nei modi cordiali, nella saggezza che aveva serena e profonda, nel felice equilibrio del suo entusiasmo⁴⁴.

Il direttore di Porto Torres, dott. Fausto Loddo, è ricordato nello stesso anno come «figura di educatore cristiano», ma anche come eminente funzionario⁴⁵. A volte i necrologi sono più stringati, quasi un resoconto delle attività svolte, come nel caso di Cornelio Pellizzari: «A Udine, si è spento il direttore didattico del IV circolo della città Cornelio Pellizzari. Era nato in Romania, da genitori friulani colà emigrati, ove aveva insegnato per lunghi anni. Nel dopoguerra, come tanti esuli era tornato in Friuli. Fu insegnante e poi direttore nelle scuole di Udine»⁴⁶.

⁴⁴ *Educatori nella luce*, «Scuola Italiana Moderna», vol. LXXIII, n. 2, 1963, p. 91.

⁴⁵ *Resurgent*, «Scuola Italiana Moderna», vol. LXXIII, n. 6, 1963, p. 101.

⁴⁶ *Resurgent*, «Scuola Italiana Moderna», vol. LXXIV, n. 6, 1965, p. 56.

Il necrologio del direttore Mario Coretti è un esempio di come anche l'attività sindacale in favore della categoria sia stimata: egli infatti è ricordato, oltre che per la sua fedeltà alla concezione cristiana della scuola, «per la sua rara competenza nel campo sindacale», che lo aveva portato ad essere cofondatore e primo segretario provinciale del Sindacato Nazionale Scuola Elementare-SI-NASCEL e consigliere nazionale dell'Associazione Italiana Maestri Cattolici-AIMC⁴⁷.

Anche quando, in altre parti della Rivista, si informa sulle benemerenze, il direttore è inserito in un contesto lavorativo che non lo vede più da solo alla direzione della scuola. Così si legge che, durante una cerimonia, è stata consegnata al direttore Delfini la medaglia d'oro con Diploma di benemerenza di prima classe conferiti dal Ministro della P.I. e «il festeggiato ha dichiarato di ritenersi un semplice custode dell'onorificenza concessa non a lui personalmente ma a tutti i suoi valorosi colleghi, che con uguale impegno hanno dedicato e dedicano la loro vita alla scuola»⁴⁸.

Il direttore didattico emerge a metà degli anni Sessanta dalle pagine di «Scuola Italiana Moderna» come colui che non abbandona la sua funzione di guida didattica e sostegno per i maestri, ma si avvia ad essere un organizzatore culturale e un funzionario statale che intesse rapporti più ampi con tutte le componenti scolastiche e degli Enti che esistono nel territorio nel quale la scuola è inserita, valendosi anche della collaborazione dei migliori maestri.

⁴⁷ *Due lutti per la scuola*, «Scuola Italiana Moderna», vol. LXXIII, n. 12, 1964, p. 13.

⁴⁸ *Vita magistrale*, «Scuola Italiana Moderna», vol. LXXI, n. 12, 1962, p. 99.

The Italian University System in the Aftermath of National Unification. Background, Reforms Trends and New Goals

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ABSTRACT: The purpose of this contribution is to analyse the situation of the Italian University System in the aftermath of the national unification process. The establishment of the Kingdom of Italy and the implementation of the Casati Law throughout the peninsula gave rise to numerous inquiries concerning the new direction and reforms trends of the university system. In this regard, it is deemed pertinent to delve into the historical backdrop that served as the foundation of this system, from the Boncompagni Law and the creation of the Ministry of Public Education to the end of the 19th century. Lastly, the final section is devoted to a reflection on the goals of university education. The need for renewal that emerged at the close of the 19th century, in reality, has been a perpetual companion to the subsequent history of the university and higher education as a whole. This transformation has also marked the final transformation of universities into active institutions in terms of social and territorial impact.

EET/TEE KEYWORDS: History of University and Higher Education; Reforms trends; Goals; Italy; XIX-XX Centuries.

Introduction

In the Italian peninsula in the aftermath of the completion of the unification process and thus with the creation of the Kingdom of Italy in 1861, the need to reform the country’s entire education system emerged ever more powerfully. In fact, alongside the needs of a more strictly material nature – such

as the construction of roads and railways or the renewal of the economic and bureaucratic apparatus – the main ‘enemy’ that our country immediately had to face was the problem of illiteracy and that of a general access to culture and knowledge that was still very limited¹.

At the time, however, in order to initiate the so-called *nationalization* process and thus to «make the Italians», it was first necessary to unite the people ideologically and to proceed with a concrete process of spreading the official language and common memories, it was then necessary to continue the establishment of a centralised and uniform school system, and with the dissemination of values and ideals in which they could jointly recognise themselves.

In the European scenario at the end of the 19th century, our country was perhaps one of the most composite realities, due to the political fragmentation that had characterised it in the previous phase, so the task entrusted to the ruling classes was certainly neither simple nor concise. A real policy of *nationalization* began in this period, which was mainly based on the diffusion of patriotism, of typically bourgeois values – such as commitment, work and responsibility –, on the commemoration of the so-called «fathers of the fatherland» and on a widespread cultural and educational intervention. In particular, it was essential to bring out the social and political, as well as cultural, value of schooling, especially among the working classes, who were convinced of its lack of usefulness. Due to limited social mobility, they in fact thought that they could not change their destiny and, therefore, that for their future

¹ For a more complete reference to the history of national unification and struggle against illiteracy, see for example: D. Bertoni Jovine, *Storia della scuola popolare in Italia*, Turin, Einaudi, 1953; E. De Fort, *Storia della scuola elementare in Italia. Dall'unità all'età giolittiana*, Milan, Feltrinelli, 1979; S. Soldani, *L'educazione delle donne. Scuole e modelli di vita femminile nell'Italia dell'Ottocento*, Milan, FrancoAngeli, 1989; S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, Bologna, il Mulino, 1993; E. De Fort, *Scuola e analfabetismo nell'Italia del '900*, Bologna, il Mulino, 1995; E. Becchi, D. Julia (edd.), *Storia dell'infanzia. Dal Settecento a oggi*, Rome-Bari, Laterza, 1996; L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999; L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-sinistra*, Brescia, La Scuola, 2001; C.M. Cipolla, *Istruzione e sviluppo. Il declino dell'analfabetismo nel mondo occidentale*, Bologna, il Mulino, 2002; E. Gentile, *La Grande Italia*, Rome-Bari, Laterza, 2006; R. Romanelli, *Ottocento. Lezioni di storia contemporanea*, Bologna, il Mulino, 2011; G. Chiosso, *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita*, Turin, SEI, 2011; G. Sabbatucci, V. Vidotto, *Storia contemporanea. L'Ottocento*, Rome-Bari, Laterza, 2018; G. Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, Bologna, il Mulino, 2019; A. Marrone, «Il progresso dell'istruzione ha bisogno di libertà». *I cattolici e la questione scolastica in Italia tra Otto e Novecento*, Rome, Studium, 2019; S. Santamaita, *Storia della scuola. Dalla scuola al sistema formativo*, Milan-Turin, Pearson, 2021; M.C. Morandini (ed.), *Vita scolastica e pratiche pedagogiche nell'Europa moderna*, Milan, Mondadori Università; G. Ricuperati, *Storia della scuola in Italia. Dall'Unità a oggi*, Brescia, Morcelliana, 2022³; C. Ghizzoni, I. Mattioni, *Storia dell'educazione. Cultura, infanzia, scuola tra Otto e Novecento*, Bologna, il Mulino, 2023.

occupations learning to read, write and do arithmetic was essentially superfluous. Education was, therefore, to be recognised as an indispensable factor for the economic, social and above all civil development of the “newborn” Kingdom of Italy. For this reason, politics progressively proceeded to raise compulsory schooling and to prepare regulations and actions aimed at limiting child labour – and thus exploitation –².

By the end of the 19th century, the illiterate was seen as an «unhappy» social element, unfit to live in a society that was moving towards modernity, which was transforming itself especially from a social and productive point of view. Certainly, in this sense, a prominent role was played by primary school, in addition to various other initiatives that publicly or privately tried to encourage the spread of education also in the adult world and not only among the young generations. For this reason, primary education has received a great deal of attention at a historiographical and historical-educational level, since it actually represented one of the most capillary and most ‘exploited’ instruments of politics at the end of the 19th and then especially of the 20th century.

On the contrary, secondary and university education have long been the subject of limited analysis, often related only to the legislative sphere. However, this does not allow us to restore the completeness and liveliness of the academic life and culture that emerged in those years that were so crucial to the history of our country. As Polenghi well explained, in fact,

Equally important is knowledge of the actual situation of the university at the time, in order to avoid endorsing historical judgements that arise from inaccurate interpretations, in which problems belonging to different decades are superimposed and confused in unambiguous interpretations. In this sense, the methodological necessity of not separating the history of ideas from the history of institutions should be recalled³.

In fact, the liberal ruling class of the late 19th century was certainly often subject to criticism, but historiographic analysis in this sense cannot be limited to political clashes. With regard to the academic world, therefore, in the first instance, it is rather necessary to understand what the motivations were for supporting the university approach already proposed by the Casati Law of

² On the process of nationalization of our country, with particular reference to school, it is useful to recall the works of: M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità d'Italia alla Repubblica*, Florence, La Nuova Italia, 1986; M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milan, Vita & Pensiero, 2003; A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milan, Vita & Pensiero, 2004; A. Quondam, G. Rizzo (edd.), *L'identità nazionale. Miti e paradigmi storiografici ottocenteschi*, Rome, Bulzoni, 2005; A. Ascenzi, *Education and the metamorphoses of citizenship in contemporary Italy*, Macerata, eum, 2006; Chiosso, *L'educazione degli italiani. Laicità, progresso e nazione nel primo Novecento*, cit.

³ S. Polenghi, *La politica universitaria italiana nell'età della Destra storica*, Brescia, La Scuola, 1993, p. 8. The English translation is mine.

1859 and then proceed along the historiographic axis to understand how the science-politics binomial was gradually strengthened, not only with the aim of *modernising* knowledge but also the various professions.

1. *From the Boncompagni Law to the Casati Law*

In order to be able to trace the reasons why the Italian academic approach followed, at least in the first post-unification phase, what had been proposed in the Kingdom of Sardinia, it is necessary to retrace some fundamental previous stages. It is useful, in particular, to go back and reflect on the transformations undergone by the school system in the aftermath of the creation of the Ministry of Public Education.

Within the broader framework outlined by the general climate of uncertainty and mobilisation that had swept through Italy during 1848 and had given new impetus to the national question, in fact, in the Kingdom of Sardinia Minister Carlo Boncompagni, on 4 October, promulgated the law on public education, which mainly placed all schools of all levels under government control⁴. It read, in fact, in Title I, *Dell'amministrazione della pubblica istruzione* [*Of the administration of public education*], in Article 1:

Public Education is under the direction of the Minister Secretary of State in charge of this department: it is his duty to promote the progress of knowledge, the dissemination of education and the preservation of sound doctrines, and to provide in every part of the administration of the Institutes and Establishments belonging to teaching and public education⁵.

In the next article, the universities were immediately mentioned, stating that the minister «following the opinion of the University Councils» would make the necessary provisions «for students' requests for dispensations for admission to courses and examinations»; his provisions, moreover, could never be contrary to the opinion of the University Council without first consulting the Higher Council⁶.

⁴ See Pazzaglia, Sani, *Scuola e società nell'Italia unita*, cit.; Santamaita, *Storia della scuola. Dalla scuola al sistema formativo*, cit.

⁵ Appendix I, in <chrome-extension://efaidnbnmibpcajpcglclefindmkaj/https://www.sale-sian.online/wp-content/uploads/2024/06/La-legge-Boncompagni-del-4-ottobre-1848-e-la-liber-ta-della-scuolaLETTO.pdf> (last access: 12.02.2025).

⁶ Note on the Board of Governors, it is mentioned in Title II, *Del Consiglio superiore di pubblica istruzione* [*Of the Higher Council of Education*]. On the Higher Council of Education, see also: G. Ciampi, *Il governo della scuola nello Stato postunitario. Il Consiglio superiore della pubblica istruzione dalle origini all'ultimo governo Depretis (1847-1887)*, Milan, Edizioni di Comunità, 1983; G. Ciampi, C. Santangeli (edd.), *Fonti per la storia della scuola. II. Il consiglio*

Article 3 then specified that all the universities of the kingdom and the establishments attached to them also depended on the Ministry of Education, while Article 5 gave a definition of «university schools» (for men), i.e. those that «by providing literary and scientific instruction, qualify those who attend them to receive the highest academic degrees in one of the faculties, or to exercise the professions that depend on them, whether these schools are established in the capital of a university or in other places in the university's district».

Then, in Title III, the law referred to the University Councils, set up in each university, which had the task of drawing up «the special regulations necessary for the execution of laws and general regulations», as well as that of promoting the most useful measures for the progress of education to the Higher Council of Education and, to the Minister, «those leading to the exact fulfilment of the laws and regulations of each university». They were also, in agreement with the professors, to draw up course programmes and transmit them to the Higher Council. The Councils were also to be responsible for the administration of the universities' property, for «deliberations concerning the legal reasons» for which the universities were responsible – subject to the Minister's authorisation – and for awarding diplomas. Furthermore, they were to deal with admissions to courses and examinations, and decide whether to admit «repeaters» to subsequent years (Article 19). Also noteworthy is the fact that the rector was chosen from among the councillors (Article 22). The proper observation of the laws by the university councils was supervised by censors, appointed for each university directly by the king.

In Title IV, *Dei Consigli delle Facoltà* [*Of Faculty Councils*], Article 28 ordered that a council was to be established in each university and for each faculty, consisting of the dean, three serving professors elected by their colleagues, and two other members elected by a free vote of the college. The function of these councils was then specified in Article 30. In particular, they were to receive, analyse and transmit to the University Council the reports from the professors on the progress of their schools; they were to propose to the University Council the regulations useful for the promotion of studies in the Faculties; they were to produce 'notes' on the students who had distinguished themselves most in the various Faculties on the basis of what the professors had indicated; finally, they were to propose to the University Council the appointment of «repeaters» for the following year and decide on the admission of candidates «to aggregation»⁷.

superiore della pubblica istruzione 1847-1928, Rome, Ministry for Cultural and Environmental Heritage, Central Office for Archival Heritage, 1994 and also the recent contributions presented at the conference promoted by CISUI and *Centro di documentazione e ricerca per la storia del libro scolastico e della letteratura per l'infanzia* of the University of Macerata, *Il Consiglio Superiore della Pubblica Istruzione e il governo del sistema universitario in età repubblicana* (Macerata, 30-31 May 2024). The Proceedings are currently being published.

⁷ Appendix I, in <chrome-extension://efaidnbnmibpcajpcgclcfndmkaj/https://www.sale-

With regard to the ordering of the Faculties, however, Boncompagni made a significant change. In fact, he decided to split the Faculty of Science and Letters, creating the Faculty of Literature and Philosophy and the Faculty of Physical and Mathematical Sciences. Greater exploration and in-depth study of the hard sciences, caused at the time not only by scientific progress but also by concrete production and territorial needs, now required more focused and analytical courses of study. This, of course, without disregarding the still central role reserved for the humanities⁸. Probably at its inception, this process of separation between what today are called *hard science* and *soft science* did not respond to epistemological reflections, but rather to the concrete and specific needs of that particular historical moment.

In the middle of the 19th century, the organisation of the university began to change, both due to new scientific requirements and through an increasingly pyramid-like structure, with Minister at the top and the Higher Council, Rectors, University Councils and Faculty Councils following.

The Universities of the Kingdom of Sardinia, i.e. at the time those of Turin, Genoa, Cagliari and Sassari, from 1848 onwards therefore came under the Ministry of Education, which exercised direct supervision over them by means of inspectors.

The law therefore appeared strongly centralising, but from Boncompagni's perspective it had liberal inspiration. The intention was above all to break with the traditional ecclesiastical hegemony, in order to finally initiate a process of secularisation that would also directly involve the entire sphere of education⁹. Minister Boncompagni – who was also very close to Cavour's political line – supported the religious and political freedom of education, and believed that thanks to this process of centralisation, this principle could in a certain sense finally be respected¹⁰. Certainly, this reflection was not without its contradictions, especially since the Minister himself supported the State's power to watch over the abilities, doctrine and morality of those who would like to teach, but inevitably risked resulting in undue personal and non-professional judgement.

At the time, there was still no clear reference to the principle of freedom of teaching and education in the legislative text, *primarily* in the Albertin Statute.

sian.online/wp-content/uploads/2024/06/La-legge-Boncompagni-del-4-ottobre-1848-e-la-liberta-della-scuolaLETTO.pdf> (last access: 12.02.2025).

⁸ Cf. Polenghi, *La politica universitaria italiana nell'età della Destra storica*, cit., p. 25.

⁹ *Ibid.*, pp. 20-21.

¹⁰ For a reference to the politics of Count Cavour, see for example: A. Omodeo, *L'opera politica del conte di Cavour*, Florence, La Nuova Italia, 1940; B. Ferrari, *La politica scolastica del Cavour. Dalle esperienze prequarantottesche alle responsabilità di governo*, Milan, Vita & Pensiero, 1982; C. Cavour, *Stato e Chiesa*, ed. by P. Alatri, Florence, Ponte alle Grazie, 1995; and the recent work of G. Amato (ed.), *C'era una volta Cavour. La potenza della grande politica*, Bologna, il Mulino, 2023.

They could be considered implicit in the framework of the definition of civil liberties, but they had not yet been specifically defined.

It is also worth remembering that the Boncompagni Law was enacted without being debated in Parliament, due to the full powers the government enjoyed during the First War of Independence. Certainly, it can be considered a sort of compromise, but probably because of this it was the subject of a lively public debate.

The first proposals for amendments to the Boncompagni Law were made by Minister Farini in 1852 and Minister Cibrario in 1854, who also took up the discussion on the issue of freedom of teaching. This complex issue was also central to Minister Giovanni Lanza's subsequent proposal, put forward in 1855 and discussed in an animated manner also during 1857. In particular, Lanza claimed political and cultural independence, as well as freedom of thought and speech for teachers, but still referred to a 'regulated' freedom.

In Lanza's vision, higher education certainly played a very important role in the Italian Risorgimento process, yet, in full line with Cavour's policy, he hoped for a state intervention that was indeed centralising but gradual, corresponding to the modernisation needs of the time and equally cautious given the general climate of instability that was sweeping across Europe¹¹.

Following the Second War of Independence and then with the annexation of Lombardy to the Kingdom of Sardinia, the need to reform the school system again became imperative. The task was entrusted to Count Gabrio Casati, who was appointed Minister of Education.

The first major law that is usually referred to in the history of Italian education is in fact Law No. 3725 of 13 November 1859, on the *Ordinamento generale della pubblica istruzione* [*The General Order of Public Education*], which was named after Casati himself¹². The law represented a real watershed in the history of Italian education. In fact, it was extended to the entire national territory after 1861 and provided for decisive innovations, such as the State's avocation of the entire education system or the principle of free and compulsory primary schooling, which was placed in the hands of the municipalities¹³.

¹¹ For a specific reference to the Farini and Cibrario projects and the Lanza law, please refer especially to: A. Colombo, *Giovanni Lanza e la libertà d'insegnamento*, «Risorgimento italiano», vol. 1-2, 1924; A. Talamanca, *Libertà della scuola libertà nella scuola*, Padova, CEDAM, 1974; and Polenghi, *La politica universitaria italiana nell'età della Destra storica (1848-1876)*, cit., pp. 25-31.

¹² <<https://archive.org/details/LeggeCasatiNumero3725>> (last access: 11.02.2025). On Minister Casati and the law he enacted, see: Pazzaglia, Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-sinistra*, cit.; Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, cit.; A.M. Orecchia, *Gabrio Casati. Patrizio milanese, patriota italiano*, Milan, Guerini, 2007; A. Gaudio, *La legge Casati. Una ricognizione storiografica*, «Annali di Storia dell'educazione e delle istituzioni scolastiche», n. 26, 2019, pp. 63-71.

¹³ <<https://www.normattiva.it/uri-res/N2Ls?urn:nir:stato:decreto.regio:1861-11-28;347@originale>> (last access: 11.02.2025).

In addition, it imposed a precise training course on teachers, stipulated that access to the various grades of education was to be by means of a sequence of examinations and, in principle, that classes of students were to be formed that were evenly distributed in terms of age.

Despite an explicit broadening of the basis for access to primary literacy, the Casati Law was still an expression of an elitist approach. It had been elaborated following the matrix of the Prussian model, which provided for strong hierarchisation and centralisation, and when it was extended to the rest of Italy, this provoked quite a few criticisms. The main accusation was that of wanting to *Piedmontise* the entire national school system. Certainly, however, despite bureaucratic slowness and still rather meagre funding, thanks to this law, the Italian school system was able to take on a more defined and efficient profile from that moment on.

Obviously, the Casati Law also included the university. In Title II, *Dell'istruzione superiore [Of higher education]*, with reference to Article 47, the task of higher education was immediately specified, namely «to direct young people, already equipped with the necessary general knowledge, in both public and private careers in which the preparation of accurate special studies is required, and to maintain and increase scientific and literary culture in the various parts of the State».

The university, which had among other things the task of training the future national ruling class, following the principle of 'centralisation', was thus placed under the direct control of the state. In fact, Article 50 states that expenses «shall be borne by the state», while the property and assets of the various institutions «shall be maintained by way of endowment, nor shall they be diverted from the purpose for which they were intended». Moreover, lecturers had to be appointed by the government and universities were not allowed to establish or modify courses without the permission of the Ministry of Education; this greatly strengthened government control and led to a progressive loss of autonomy of the academic world. The intention was to create a more uniform university education system, thus limiting the local power of individual institutions.

Article 39 then specified that higher education was to comprise five faculties, namely Theology, Law, Medicine, Physical, Mathematical and Natural Sciences and, finally, Philosophy and Humanities. Each university was then to create structured and well-articulated study paths, through an educational offer characterised by specific teachings for each faculty. However, even if the didactic organisation was up to the faculties, the final go-ahead would still have to come from the Higher Council¹⁴.

Within the framework outlined by the Casati Law, the role of the Minister

¹⁴ <<https://archive.org/details/LeggeCasatiNumero3725>> (last access: 11.02.2025).

of Education therefore continued to be crucial, just as the authority of the Higher Council and the three general inspectors (for higher studies, for classical secondary studies and for technical, normal and primary studies), already mentioned in Article 2, remained essential.

In this sense, Moretti also refers to a «‘representation’ of executive power» attributed to the rectors, who were considered in a certain sense to be local administrative authorities. They were responsible for controlling and supervising the observance of laws and regulations, they had to make decisions on appeals, they also had to exercise a disciplinary task and supervise the activity and behaviour of teachers and lecturers, and they always had to act in a coordinated manner at central and local level¹⁵.

Under the authority of the rector, however, the structure of the universities appeared rather weak. Each faculty was headed by a government-appointed dean who remained in office for three years – renewable –, and the academic body consisted of ordinary professors and aggregate doctors, who were, however, considered a rather marginal figure¹⁶. Ordinary professors, appointed directly by the State, were the only ones with a permanent position and were responsible for teaching the main disciplines contained in the university curriculum. Then there were the «extraordinary» professors, who had a less stable position, the lecturers in charge, who lacked professional stability and were dependent on the official academic body, the assistants, who collaborated with the professors and supported them in teaching and research activities, and finally, the free professors, who were scholars ‘outside’ the university, who carried out teaching activities without having a fixed professorship¹⁷.

In the light of a still rather limited collective action and relationships mostly tied to a hierarchical order, the university did not yet appear at the time as a cohesive and strongly incisive whole in its territory.

It is evident that when the legislation was promulgated, Casati could not have anticipated that it would subsequently serve as the foundation for national public education policy, particularly given the fact that the measure was drafted during a period characterised by considerable opposition and perplexity. The principles of the law can certainly be linked to those of a moderately conservative liberalism, typical of the Italian ruling class of the time, con-

¹⁵ Cf. M. Moretti, *Sul governo delle università nell’Italia contemporanea*, «Annali di storia delle università italiane», n. 14, 2010, p. 17.

¹⁶ Regarding the composition of the teaching staff of universities in the post-Unitarian period, see especially M. Moretti, I. Porciani, *Il reclutamento accademico in Italia. Uno sguardo retrospettivo*, «Annali di storia delle università italiane», 1997, pp. 11-39 and M. Moretti, *I cadetti della scienza. Sul reclutamento dei docenti non ufficiali nell’università postunitaria*, in I. Porciani (ed.), *Università e scienza nazionale*, Naples, Jovene, 2001, pp. 151-203.

¹⁷ U.M. Miozzi, *Lo sviluppo storico dell’università italiana*, Florence, Le Monnier, 1993, p. 14.

cerned with preserving the humanistic cultural tradition and at the same time willing to embrace modern scientific, productive, cultural and civil needs¹⁸.

For Casati, therefore, the state could use the university as a tool through which to try to raise the cultural base of its citizens. In this sense, it had to focus on the implementation of free access to higher studies, which would contribute to the personal and professional growth of the community¹⁹.

The ruling class that derived from this type of education was definitely of a fully bourgeois origin, and this contributed to giving the school designed by Casati an essentially elitist character. This approach proved resilient and was further reinforced by subsequent measures, most notably the Gentile Law.

2. *A complex transition to the 20th century*

At the end of the 19th century, the debate on education and schooling issues was animated on several fronts: the democrats supported the principle of public education and thus the avocation of education to the state; the Catholics, on the other hand, upheld the principle that education could not be the exclusive task of the state, but of the family, and claimed their own secular function in education; the liberals, finally, took an intermediate position, supporting the public school system, but leaving families the option of private solutions as well²⁰.

At the time of the extension of the Casati Law throughout the country, the distribution of universities and thus the Italian academic population was still very limited and uneven across the peninsula. To be sure, the law had well condensed numerous elements from the previous Lanza Law and Austrian legislation, but this did not shield it from criticism and subsequent attempts to amend it. Practically all the holders of the Ministry of Education attempted, to a greater or lesser extent, to make changes between 1859 and 1881. A process

¹⁸ With particular reference to the history of the Italian university in the liberal period, see especially: B. Palma, *L'università tra accentramento e autonomia*, Urbino, Università degli Studi di Urbino, 1983; A. Saccomanno, *Autonomia universitaria e costituzione. I. L'autonomia universitaria nello Stato liberale*, Turin, Giappichelli, 1989; I. Porciani (ed.), *L'università tra Otto e Novecento: i modelli europei e il caso italiano*, Naples, Jovene, 1994; 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; G. Fioravanti, M. Moretti, I. Porciani (edd.), *Fonti per la storia della scuola. V. L'istruzione universitaria*, Rome, Central State Archives, Ministry of Cultural Heritage and Activities, Central Office for Archival Assets, 2000; I. Porciani (ed.), *L'università italiana. Repertorio di atti e provvedimenti ufficiali 1859-1914*, Florence, Olschki, 2001; G.P. Brizzi, P. Del Negro, A. Romano (edd.), *Storia delle Università in Italia*, Messina, Sicania, Vol. I, 2007.

¹⁹ Cf. Miozzi, *Lo sviluppo storico dell'università italiana*, cit., pp. 11-12.

²⁰ *Ibid.*, p. 19.

that only ended with a more precise definition of the competences and role of the Higher Council of Education, which in fact became the real steering instrument of the policy implemented in this area

At this stage, one of the most significant attempts to modernise the Casati law had been proposed by Carlo Matteucci, during his brief ministerial term that extended between 31 March and 6 December 1862. Matteucci's proposal was based on the prospect of greater freedom for the universities, albeit limited to the area of internal management, i.e. in the definition of curricula and in the recruitment of lecturers, which in his opinion should be more based on scientific competence. He also hoped for a greater connection between the disciplines included in the curricula and the real needs of the country, in order to support the entire modernisation process, and a substantial distinction of the universities according to their function and incisiveness²¹.

With Royal Decree No. 719 of 31 July 1862, the government essentially took note of these differences and, taking up a denomination previously used in the Kingdom of Sardinia and the Papal States, distinguished between primary and secondary universities. The first category included the universities of Turin, Pavia, Pisa, Bologna, Naples and Palermo, which were later joined by those of Padua and Rome, while secondary universities included those of Genoa, Parma, Modena, Siena, Cagliari, Sassari, Catania and Messina. The Universities of Macerata – which received a small government subsidy – and the free Universities of Camerino, Urbino, Perugia and Ferrara were added to this list.

The distribution of faculties is also interesting in this respect. All the universities had Faculties of Medicine and Law. The Faculty of Literature and Philosophy was only present in the universities of Turin, Padua, Pavia, Bologna, Pisa, Rome, Naples and Palermo, while the Faculty of Physical and Mathematical Sciences was present in Turin, Pavia, Pisa, Bologna, Naples, Palermo, Genoa, Parma, Modena, Cagliari, Catania, Messina, Padua, Rome, Urbino, Perugia and Ferrara²².

The difference obviously also concerned legal recognition, especially since the free universities were financially dependent mainly on the local authorities – which, by virtue of this reason, also exercised control over them from an administrative point of view –, teaching organisation, the remuneration of the teaching staff and, first and foremost, the different number of students enrolled.

²¹ On Matteucci's proposal, see especially the parts devoted to it in: M. Di Domizio, *L'università italiana. Lineamenti storici*, Milan, AVE, 1952; G. Talamo, *La scuola. Dalla legge Casati alla inchiesta del 1864*, Milan, Giuffrè, 1960; Polenghi, *La politica universitaria italiana nell'età della Destà storica*, cit.; Fioravanti, Moretti, Porciani (edd.), *Fonti per la storia della scuola. V. L'istruzione universitaria*, cit.

²² Cf. Polenghi, *La politica universitaria italiana nell'età della Destà storica*, cit., p. 192.

It is no coincidence, then, that in the aftermath of national unification, one of the problems that had emerged around the academic debate was precisely that of the territorial distribution of universities. The problem was complex because it obviously responded to scientific, cultural but also political motivations. The orientation that prevailed was essentially that of reasoning with a view to the eventual suppression of faculties rather than universities, which continued to be regarded as indispensable centres of intellectual life²³.

With the construction of the national university system, a rather complex period for the debate on academic issues had begun at the same time. The scenario was essentially divided between those who were in favour of the equalisation of all universities operating throughout the country, including those defined as free, and those who argued that the task of the scientific and cultural education of the new generations should only be entrusted to the large universities.

Recent historiography on higher education has well highlighted the difference between these two 'sides', and has also succeeded in bringing out a renewed and important interest in the so-called minor universities. This was made possible mainly by relating the university question to the broader process of national construction, with specific reference to the definition of the relationship between nation and city, centre and periphery. In particular, at a local level, these reflections have been connected to the role and strategic function exercised by universities in reference to the formation of the ruling classes and professional management, in the context of the socio-economic development of the individual territorial contexts of reference²⁴.

Graduation certainly represented a means of mobility and social affirmation, however, the problem was rooted in earlier school grades. Lack of resources and a general mistrust of schooling still resulted in too limited access to primary school and an even more limited continuation of studies in secondary school.

In this first post-unification phase, in principle, the *Destra storica* had tried to tackle the main problems highlighted by the unification process, however, the impetus of the Risorgimento uprisings and ideals was no longer sufficient

²³ This line of thought found explicit reference in Ruggero Bonghi's report on the draft budget, presented in March 1870 by Finance Minister Quintino Sella.

²⁴ About «minor universities» see: M. Da Passano (ed.), *Le Università minori in Italia nel XIX secolo*, Sassari, Centro interdisciplinare per la storia dell'Università di Sassari, 1993; L. Sitran Rea (ed.), *La storia delle università italiane. Archivi, fonti, indirizzi di ricerca. Atti del convegno. Padova, 27-29 ottobre 1994*, Trieste, Edizioni Lint, 1996; M. Moretti, *Piccole, povere e 'libere': le università municipali nell'Italia liberale*, in *Le Università minori in Europa (secoli XV-XIX). Convegno internazionale di studi, Alghero 30 ottobre-2 novembre 1996*, ed. by G.P. Brizzi and J. Verger, Rubbettino, Soveria Mannelli 1998, pp. 533-562; and the recent L. Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013, p. 19.

and only a limited *élite* began to be supported. In the next phase, the advent of the *Sinistra storica* to political power, however, was a process that was essentially in continuity, albeit taking into account the ideological differences, which in this case were based on progressive liberal ideas.

The generation of intellectuals that had animated the Italian Risorgimento now seemed incapable of involving young people ‘emotionally’ and this forced a major slowdown in the ‘daily’ construction of the state. This was also happening in the ranks of university professors. In this sense, the university appeared ‘to be stuck’ between a substantial inability to re-propose the ancient Risorgimento ideals with the same vigour, and the positivist drive, strongly linked to the value of science but lacking a deep spiritual value²⁵.

In this sense, the national university landscape still appeared rather disjointed. The effects of the resistance to homologation to the Casati Law were evident, especially in the case of the Neapolitan and Tuscan universities.

In the 1870s, the main solution that worked to reform the university system was the reorganisation of curricula through specific regulations, while during the 1980s the introduction of elective practices was noteworthy, with reference to half of the members of the Higher Council and the members of competition commissions, while reserving the final power of appointment of rectors and commissioners to the minister. Interventions that certainly did not yet form part of an organic university reform project, but which contributed to animating the debate created around the university issue.

During this period, the ‘clash’ between those who supported state authority and those who supported university autonomy became increasingly heated. The subject of the confrontation concerned above all the interference of the central power in university teaching, considered by some to be legitimate and by others to be excessive.

Accompanying this theme were of course others, equally important: the actual validity of the Casati law, the new innovative thrusts, the relationship between politics and education, the role of the Higher Council, the administrative set-up of universities, the effectiveness of university education with regard to economic and territorial needs, etc.

With particular reference to the subject of autonomy, at the beginning of the 19th century, the proposals put forward by Minister Baccelli appeared very interesting. Specific reference is made here to Draft Laws no. 241 of 17 November 1881, no. 26 of 25 November 1882, concerning *Modificazioni alle leggi vigenti per l'istruzione superiore del Regno* [Modifications to the Laws in Force for Higher Education in the Kingdom], and Draft Law no. 67 of 13 June 1895, *Sull'autonomia delle Università, Istituti e Scuole superiori del*

²⁵ Cf. Polenghi, *La politica universitaria italiana nell'età della Destra storica*, cit., p. 183; check also <[https://www.treccani.it/enciclopedia/l-universita_\(L'Unificazione\)/>](https://www.treccani.it/enciclopedia/l-universita_(L'Unificazione)/>) (last access: 13.02.2025).

Regno [On the Autonomy of the Universities, Institutes and Higher Schools of the Kingdom].

In short terms, Baccelli's proposal envisaged full recognition of the universities' legal personality, a fixed endowment of state funding and, above all, the so-called «triple autonomy», i.e. administrative, didactic and disciplinary autonomy. Obviously under this new project the relationship between the central government and the universities would have changed significantly.

Within the framework of greater autonomy, it was envisaged that the rector would be elected by secret ballot by ordinary and emeritus professors, also applying a system of faculty rotation to prevent the larger faculties from taking control of the university. Each faculty would be responsible for drawing up its own teaching regulations and the deans would also be elected.

The recognition of the universities' legal personality and administrative autonomy then provided for the establishment of another academic body: the board of trustees. The board would consist of the rector, acting as chairman, the deans of the faculties and representatives of the provincial and municipal administrations, four for the larger universities and two for the smaller universities. The board would have had purely administrative functions and, together with the college of professors, would have been involved in the exercise of disciplinary action. The general regulations of the university, on the other hand, would have been drawn up by the college of professors²⁶.

According to Baccelli's proposal, the ministry would have retained preventive control over the budgets, submitted by the various boards of directors, and the minister would have had the possibility of intervening in the decisions submitted. The educational autonomy of universities, on the other hand, would have been in a certain sense 'controlled' by the introduction of a system of state examinations, aimed at verifying the quality of educational and professional preparation. On the other hand, the introduction of the elective principle for access to academic posts and the division of tasks between academic bodies would have given greater autonomy to the universities²⁷.

However, although the project received approval in the House, it failed to pass in the Senate. The reasons ranged from those of a more strictly administrative nature, such as the fears created around the possibility of stabilising state funding or the possibility for non-academic bodies to participate in the board of universities of trustees, to those of a more strictly scientific nature, linked in particular to the issue of freedom of teaching and science.

In the debate that developed around Baccelli's proposals, one of the most notable opponents was Silvio Spaventa. In detail, he believed that by upholding the principle of the autonomy of universities, the risk would be to make them independent social institutions in relation to the state. This was certainly

²⁶ Cf. Moretti, *Sul governo delle università nell'Italia contemporanea*, cit., pp. 20-21.

²⁷ *Ibid.*

not a desirable objective, especially given the unification process and the consequent 'strength' that the state and its organs had now acquired. Spaventa, on the other hand, was not against state funding of universities, but he also considered it an element that could not leave room for autonomy. Indeed, it could not be possible where there was no administrative autonomy of budgets²⁸.

For its part, Baccelli's position supported the hypothesis that a modern state would need to meet its needs precisely through the university. Indeed, it was the place for the development of scientific, educational, technical and professional culture and, precisely because of its function, it was important for the state to place it under its direct control.

Following an investigation of the public education services, however, it was soon realised that the application of the general state accounting regulation to universities could not be reconciled with the real needs of the administration of academic institutions. It was necessary to wait for more adequate regulations before envisaging concrete administrative autonomy²⁹.

In the wake of these reflections, an initial proposal was drafted in 1910 by Minister Credaro, who presented it to the Senate in February of the following year. Rather than autonomy, however, he spoke of a «decentralisation measure», which was to 'free' higher education from constraints unsuitable for its purposes and not in keeping with the 'dignity' of those who governed it. However, among the guiding principles of the project was still the need to proceed with the consolidation of state expenditure, especially since the universities continued to be state institutes and, precisely because of this motivation, the state should have taken an interest in the strengthening of studies and the consolidation of national culture³⁰.

Even this project, however, failed to materialise and, in fact, it was not until Royal Decree No. 1216 of 20 July 1922 that the administrative decentralisation of universities and higher institutes was once again discussed³¹.

²⁸ See S. Spaventa, *Discorsi parlamentari*, Rome, Tipografia della Camera dei Deputati, 1913.

²⁹ For a more detailed bibliography, please refer to the useful repertory: I. Porciani (ed.), *L'università italiana. Repertorio di atti e provvedimenti ufficiali 1859-1914*, Florence, Olschki, 2001 and I. Porciani, M. Moretti, *L'università italiana. Bibliografia 1848-1914*, Florence, Olschki, 2002.

³⁰ See Di Domizio, *L'università italiana. Lineamenti storici*, cit., pp. 188-189.

³¹ The decree was issued by virtue of Law No. 1080 of 13 August 1921, by which the government was given full powers to reform the administration.

3. *Reflections around the University's purpose*

In the aftermath of national unification and with the creation of a university system that had to correspond to broader needs, alongside administrative and didactic reflections, one of the most important and significant was certainly the redefinition of the aims and directions of the renewed academic approach.

The crux of the question mainly concerned whether university studies and activities could represent the focus of professional preparation, or whether they could correspond to real research workshops, mostly focusing on their scientific mission.

Several proposals for a solution to this question have been developed since the early post-unification period. In 1866, for example, Minister Berti had put forward the idea of a distinction between professional and more properly scientific courses. However, this idea was not followed up. Later, in 1881 during a question in the Senate by Minister Baccelli, Pantaleoni expounded a thesis that the professional purpose was to be considered different from the purely scientific one. In this sense, he then proposed that the professional purpose should be left to the universities and that, instead, the concrete progress of science should be attributed to the higher institutes.

A very similar proposal was then also made by Turbiglio in 1892, while in 1912 the University Congress supported the scientific purpose of universities, but on the other hand also advocated that each professor should teach two courses, one scientific, precisely, and the other professional.

All these solutions did not really lead to anything concrete because it was realised early on that it was impossible to separate these two aims. Although different from each other, one could not exist without the other, so it was impossible to think of a system of separate orders.

Scientific and professional endings have always been essentially complementary. It is evident that individuals who have been 'educated' in research, analysis and the exercise of critical thinking will undoubtedly possess the requisite tools to engage in professional practice. Furthermore, it is evident that the acquisitions and progress of science itself are the natural prerequisites for practical and professional activity³².

The fundamental task of university education, therefore, is to transmit a method. In this sense, the methodology is described as transversal, meaning that it is not linked to a single discipline. Rather, it is linked to the ability to apply a scientific method.

In this regard, what Guido Fusinato expressed in a session of the Chamber of Deputies on 4 December 1895, when presenting the report on the bill concerning the autonomy of the Kingdom's Universities and Higher Institutes,

³² See Di Domizio, *L'università italiana. Lineamenti storici*, cit., pp. 191-193.

which bore the signature of Baccelli, is interesting and far-sighted³³. To summarise, Fusinato explained how university teaching could not be reduced exclusively to the service of practice and the development of professionalism, because this implied reducing professionalism to mere empirical activities. Material knowledge and practical skills, in fact, are “superficial” elements that are often learned in the course of one’s professional practice and career. Rather, he referred to the need to acquire «professional leadership». It is only through the possession of a robust scientific background, a solid grasp of theories and principles, and the assimilation of a rigorous scientific method, that one can cultivate what might be termed a scientific mental *habitus*. Once internalised, this mental *habitus* would persist throughout one’s lifetime³⁴.

Scientific study and preparation should, therefore, take place in a disinterested manner, or at least not for reasons exclusively related to professional preparation or material utility. Therefore, first of all, the student should understand what science is and then understand the methodology with which scientific work is done. True professional preparation, in fact, lies in scientific maturity, in the ability to exercise one’s critical spirit in an agile and above all independent manner.

Again, taking up what Fusinato expressed, students were to be conveyed «feelings and ideas» that were to be considered capillary and active energies «of the soul and intellect». These elements would have constituted a true educational force, capable of penetrating the social and not just the professional setting, fortifying the spiritual value, so to speak, of the idea of science that was identified at this point with that of the University³⁵.

These reflections on the purpose of university education that emerged forcefully in the aftermath of national unification have, in fact, spanned the entire history of higher education and still animate the debate around the university question today.

In the last decades of the 19th century, it was realised that the university could no longer represent something «monolithic». It necessarily had to encounter national and local needs and assume, as far as possible, a real territorial identity. This necessarily implied participation of state and local authorities in the decision-making and organisational processes related to academia.

During this period, the need to prevent universities from becoming mere institutes designed to award diplomas, grant access to public competitions or transmit an entirely empirical education also emerged. This reflection was rooted in issues that were not only political, cultural and social, but also peda-

³³ <<https://www.gazzettaufficiale.it/eli/gu/1895/12/05/286/sg/pdf>> (last access: 13.02.2025). Guido Fusinato was undersecretary of the Ministry of Foreign Affairs at the time, then Minister of Education during the Giolitti government, from May to August 1906.

³⁴ See Di Domizio, *L'università italiana. Lineamenti storici*, cit., pp. 191-192.

³⁵ Cf. Miozzi, *Lo sviluppo storico dell'università italiana*, cit., p. 196.

gological. The definition of university regulations, curricula and teaching methodologies, in fact, even today cannot ignore a reflection of an educational nature. It does not only concern its formal and explicit approach, but more the contents and the true educational validity of the role of universities³⁶.

In this sense, a central role is also acquired by the recent relaunch of studies on the history of the university and higher education, which can be seen as a useful tool for understanding the transformation of universities and their mission, with a view to the future strengthening of its areas of competence and intervention. It is noteworthy that, in the contemporary context, in addition to the conventional dimensions concerning teaching and research, significant emphasis is being placed on the university's Third Mission, with a particular focus on public engagement. This aspect, in practical terms, quantifies the impact and effectiveness of the university's presence in the territories and communities of reference.

³⁶ On reflection on the mission and functions of the university, see the recent L. Pomante, *Between History and Historiography. Research on Contemporary Italian University*, Macerata, eum, 2014; E. Bogacz-Wojtanowska, P. Jedynak, S. Wrona, A. Pluszyńska, *Universities, Stakeholders and Social Mission: Building Cooperation Through Action Research*, Routledge, 2022, <<https://research-ebsco-com.ianus.unimc.it/linkprocessor/plink?id=a8c00f53-7146-323d-847d-da2ceee919fe>> (last access: 12.02.2025) and J. Ortega y Gasset, *Missione dell'università*, ed. by A. Savignano, Milan-Udine, Mimesis, 2023.

*Sources
and Documents*



Fonti
e Documenti

Fonti per la storia della scolarizzazione etnica in Brasile. Le scuole italiane nello Stato di San Paolo secondo Arturo Magnocavallo

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Sources for the history of ethnic schooling in Brazil. Italian schools in the State of São Paulo according to Arturo Magnocavallo

ABSTRACT: Ethnic schooling constitutes one of the least explored fields of investigation in historiography. However, in recent years, driven by the increase in transnational approaches to historical-educational research, there has been an increase in studies and the availability of documentary heritage useful for launching in-depth investigations into the development of schools in migratory contexts. Among them, that relating to the Brazilian state of São Paulo, where hundreds of thousands of Italian migrants flowed between the end of the nineteenth and the early decades of the twentieth century, deserves particular attention. The report transcribed below, written by Arturo Magnocavallo after a specific mission to sound out the conditions for the foundation of a secondary school, offers us a significant cross-section of the Italian school reality in the São Paulo context at the beginning of the twentieth century.

EET/TEE KEYWORDS: Ethnic Italian schooling; Italian migration; São Paulo's schooling; Brazil; XX Century.

1. *Il patrimonio archivistico italiano sulle scuole italiane a San Paolo del Brasile*

È noto che lo Stato di San Paolo è stato il luogo in cui si è verificato il flusso più significativo di immigrati italiani in Brasile. Gli italiani entrati tra il 1888 e il 1919 rappresentavano il 44,7% della popolazione immigrata, ma se limitiamo la nostra attenzione al periodo tra il 1887 e il 1902, la percentuale di italiani che costituivano la popolazione immigrata sale al 63,5%¹. Si tratta di valori che andrebbero, peraltro, disaggregati tenendo conto della distinzione tra immigrazione interna legata, almeno in parte, alla colonizzazione delle aree rurali e immigrazione più urbana. Alla luce di tali dinamiche migratorie la letteratura prodotta negli ultimi anni ha sentito la necessità di stabilire con maggiore precisione lo sviluppo quantitativo del fenomeno delle scuole etniche in Brasile e, nello specifico, nello Stato di San Paolo². I documenti d'archivio possono aiutare a ricostruire la mappa delle istituzioni scolastiche e delle condizioni delle esperienze di scolarizzazione emerse dopo il primo arrivo degli italiani nello Stato di San Paolo. La questione è stata introdotta con l'aiuto soprattutto di fonti italiane, gli annuari delle scuole italiane all'estero, che hanno permesso di presentare una prima panoramica del numero di studenti iscritti e del numero di scuole limitatamente a quelle sovvenzionate dal governo italiano. Nel periodo compreso tra l'ultimo decennio dell'Ottocento e l'inizio degli anni Trenta, si registrò un numero crescente di alunni fino all'anno precedente l'inizio della guerra mondiale, raggiungendo i 23.412 alunni³. I limiti degli interventi di politica scolastica dei diversi Stati brasiliani, analizzati in alcuni contesti in modo più approfondito, hanno permesso di spiegare la crescente presenza di scuole italiane, alcune delle quali sostenute anche dalle autorità consolari. Il numero di iscrizioni era destinato a diminuire negli anni successivi, in relazione all'accelerazione del processo di nazionalizzazione dell'istruzione in Brasile e allo sviluppo del sistema scolastico pubblico.

Chi ha affrontato il tema, tuttavia, ha evidenziato il contributo dell'analisi quantitativa come discorso introduttivo e ha sottolineato la necessità di chiarire meglio la mappa delle iniziative di scolarizzazione in Brasile e nello Stato di San Paolo. Non disponiamo ancora di un'analisi quantitativa, frutto

¹ A. Trento, *Do outro lado do Atlântico: um século de imigração italiana no Brasil*, São Paulo, Nobel 1989, pp. 107-124.

² A. Ascenzi, A. Barausse, R. Sani, T.Â. Luchese, *History of education and migrations: crossed (or connected or entangled) histories between local and transnational perspective: a research «agenda»*, «History of Education & Children's Literature», vol. XIV, n. 2, 2019, pp. 227-262.

³ A. Barausse, *Le scuole italiane nel Rio Grande do Sul attraverso le carte consolari tra la fine dell'Impero e l'inizio della Repubblica (1875-1893)*, in A. de Ruggiero, V.B. Heredia, A. Barausse, *História e narrativas transculturais entre a Europa Mediterrânea e a América Latina*, 1 ed., Porto Alegre, EDIPUCRS, 2017, Vol. 1, pp. 195-248.

di uno scavo sistematico negli archivi di origine italiana e brasiliana, sulle singole realtà migratorie italiane presenti nei diversi contesti della federazione di Stati. Una comprensione più analitica della presenza delle scuole italiane dovrebbe essere strettamente legata anche a uno studio più approfondito dei livelli di scolarizzazione e dei tassi di alfabetizzazione distribuiti nelle aree di insediamento sia dei coloni nei contesti rurali sia degli immigrati italiani nelle aree urbane; sarebbe particolarmente utile un'analisi delle iscrizioni scolastiche, delle suddivisioni per genere ed età, delle professioni dei genitori e della loro provenienza geografica.

Un contributo significativo alla mappa delle istituzioni scolastiche italiane sorte dopo il primo arrivo degli italiani nello Stato di San Paolo può essere dato dallo studio della documentazione consolare. Alcune ricerche hanno iniziato a esplorare in modo più sistematico le fonti prodotte dagli uffici consolari. Oltre all'utilizzo di relazioni già pubblicate tra la fine dell'Ottocento e l'inizio del Novecento e recentemente sistematizzate e pubblicate per alcuni Stati, come il Rio Grande do Sul⁴ o lo Stato di Santa Caterina⁵, sono stati introdotti altri manoscritti inediti, conservati negli archivi del Ministero degli Affari Esteri italiano, soprattutto per le scuole⁶. La documentazione archivistica deriva da scelte e orientamenti che sono cambiati nel tempo e che hanno riguardato soprattutto le scelte politiche ministeriali italiane e la loro macchina amministrativa. Così, ad esempio, esiste una significativa documentazione che segue le indicazioni derivanti dalla riforma della scuola italiana all'estero voluta dal Presidente del Consiglio Francesco Crispi e che, a partire dal 1889, affidò alle autorità consolari importanti compiti di controllo e sviluppo delle scuole etniche sovvenzionate⁷. Le relazioni consolari, infatti, non erano avarie di dati e osservazioni e spesso integravano la documentazione

⁴ G. Romanato, V.B.M. Herédia, *L'emigrazione italiana nel Rio Grande do Sul brasiliano (1875-1914): Fonti diplomatiche. Consiglio regionale del Veneto*, Ravenna, Longo Editore, 2018.

⁵ J.C. Radin, *L'immigrazione italiana in Santa Catarina e Paraná: Fonti diplomatiche italiane (1875;1927)*, Chapecó, Ed. UFFS, 2020.

⁶ T.A. Luchese, A. Barausse, R. Sani, A. Ascenzi, *História da educação e migrações: olhares cruzados entre o local e o transnacional*, in Idd., *Migrações e História da Educação: saberes, práticas e instituições, um olhar transnacional*, 2021, pp. 21-63, <<https://www.ucs.br/educs/livro/migracoes-e-historia-da-educacao-saberes-praticas-e-instituicoes-um-olhar-transnacional/>> (last access: 10.01.2025).

⁷ Cfr. A. Barausse, «Esportare la lingua e la cultura del Belpaese». Le scuole italiane all'estero dall'Unità ai primi anni del fascismo (1861-1925), «History Of Education & Children's Literature», vol. XVI, n. 2, 2022, pp. 89-144; G. Floriani, *Scuole italiane all'estero: cento anni di storia*, Roma, Armando Editore, 1974; D. Castellani, *Scuole italiane all'estero. Memoria, attualità e futuro*, Milano, FrancoAngeli, 2018; G. Ciampi, *Le scuole italiane all'estero*, in V. Pellegrini (ed.), *Amministrazione centrale e diplomazia italiana (1919-1943): fonti e problemi*, Roma, Istituto Poligrafico e Zecca dello Stato, 1998, pp. 115-122; P. Salvetti, *Le scuole italiane all'estero*, in P. Bevilacqua, A. De Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana. Arrivi*, Roma, Donzelli Editore, 2002, pp. 535-549.

prodotta dagli stessi direttori delle scuole. Questa documentazione è spesso arricchita da relazioni aggiuntive e specifiche scritte da agenti consolari o da insegnanti o figure che fungevano da ispettori scolastici⁸. D'altro canto, si fa scarso uso delle fonti consolari in possesso dei consolati italiani in Brasile che, per motivi organizzativi e normativi, non sono ancora a disposizione degli studiosi. Come è già stato sottolineato, i consoli non erano sempre in grado di effettuare le visite ufficiali prescritte dalla normativa agli istituti scolastici sparsi nei luoghi di emigrazione e quindi si affidavano alle note che venivano trasmesse alle autorità consolari da chi era delegato a questo compito⁹. La rigorosa «critica metodologica» delle relazioni consolari è indispensabile per comprendere appieno la forza e i limiti di tali fonti¹⁰ la maggior parte delle quali erano destinate a supportare le richieste di finanziamento per sostenere le attività svolte dagli stessi insegnanti delle scuole o dalle società di mutuo soccorso. Le relazioni consolari sono documenti prodotti principalmente con l'obiettivo di definire il fabbisogno finanziario per sostenere la crescita delle scuole nelle città o nelle aree interne dove la presenza di italiani esprimeva una significativa domanda di istruzione. In questo senso, sono presi per far luce sull'evoluzione dell'entità dell'intervento finanziario dello Stato italiano nello sviluppo delle scuole italiane nei diversi stati e, in particolare, nello Stato di San Paolo. È da una nota dell'ambasciatore Riva, datata 24 marzo 1890, che apprendiamo l'ammontare complessivo dei fondi per le scuole di San Paolo, che ammontavano a 7.000 lire¹¹. Quindici anni dopo, il console Pio di Savoia avrebbe proposto un fondo complessivo di 23.000 lire¹². Le condizioni sarebbero cambiate ancora di più negli anni che precedettero lo scoppio della Prima guerra mondiale e nei decenni che seguirono lo sviluppo delle scuole nel periodo tra le due guerre mondiali. Per l'anno finanziario 1910-1911 furono stanziati 30.000 lire (ordinanza del 27 luglio 1912). Inoltre, i documenti rivelano non solo le lamentele per l'insufficienza degli scarsi sussidi ministeriali a fronte della notevole crescita quantitativa delle scuole della città e dello Stato, ma anche le ripercussioni dei cambiamenti politici nelle strategie delle autorità

⁸ A. Barausse, *Fonti per una storia delle pratiche educative nelle scuole italiane del Rio Grande do Sul (Brasile): dalla colonizzazione al periodo Vargas*, «Revista Linhas», vol. 20, n. 44, settembre-dicembre 2019, pp. 126-153. Disponibile all'indirizzo: <<https://www.revistas.udesc.br/index.php/linhas/article/view/19847238204420191260>> (ultimo accesso: 15.01.2025).

⁹ *Ibid.*

¹⁰ A. Barausse, T.Â. Luchese, *Uma história da educação dos (i)migrantes italianos entre o local e o transnacional: entrecruzando documentos e olhares investigativos*, in A. Karsburg, M. Vendrame, *Variações da Micro-história no Brasil: temas, abordagens, desafios*, Oikos, São Leopoldo, 2019, pp. 171-203.

¹¹ Telespresso del ministro di Legazione Riva del 24 marzo 1890, in ASMAE, b. 341, f. Scuole italiane sussidiate nello Stato di San Paolo G 184.

¹² Rapporto del Console Gherardo Pio di Savoia al Ministro degli Affari Esteri del 29 luglio 1906. Per le scuole italiane. Anno Scolastico 1906, in ASMAE, AS 1889-1910, Cat. III B, b. 341, f. Carte sciolte G 184, p. 2.

ministeriali o diplomatico-consolari in relazione al finanziamento delle scuole. Un sostegno che fu basato su un'attenta valutazione della struttura politica, ma anche sulle iniziative messe in atto da associazioni o privati a livello locale per raccogliere fondi per le scuole a complemento delle risorse finanziarie dello Stato italiano, come ad esempio, quelle promosse in occasione delle celebrazioni patriottiche. Basti pensare alla scelta ministeriale adottata all'inizio degli anni Novanta del XIX secolo, di soprassedere alla decisione di finanziare con sussidi le scuole italiane vista la nascita della nuova repubblica brasiliana ed i chiarimenti intorno alla «la posizione speciale creata per i sudditi italiani dal decreto sulla naturalizzazione degli stranieri». Una decisione adottata anche per evitare ulteriori dissensi all'interno della comunità italiana, «purtroppo già così divisa dai partiti»¹³.

La documentazione d'archivio integra con maggiore precisione i dati pubblicati negli annuari scolastici e ci permette quindi di conoscere lo sviluppo dell'educazione etnica nello Stato e nella capitale. I rapporti inviati a Roma non erano rari e lo stesso ministero non poteva che «lodare l'esattezza, la precisione e la copia delle informazioni» fornite dall'autorità consolare¹⁴. Da una pur fugace lettura della documentazione archivistica, è possibile notare il progressivo sviluppo delle scuole di etnia italiana nello Stato. Come sottolineava il console Rozwadowsky all'inizio degli anni '90, gli immigrati italiani non avevano ancora fondato «una vera scuola italiana corrispondente alle esigenze delle numerose famiglie di connazionali ricchi e benestanti»¹⁵. I tentativi di raggiungere l'obiettivo non mancarono, ma:

la disunione tra i vari elementi della colonia, dovuta all'eccesso di campanilismo regionale, scomparso in Italia e risorto all'estero, le continue piccole inimicizie e gelosie tra di loro, la mancanza di un gruppo di notabili che per consenso, per onore, per intelligenza potessero esercitare una reale influenza sulle masse e portarle a compiere opere, la cui necessità è riconosciuta da tutti, ha sempre frenato gli sforzi dei pochi benintenzionati¹⁶.

È interessante notare come il console, per enfatizzare il fenomeno delle divisioni «regionaliste», offrì una rappresentazione identitaria italiana che era ancora lontana dall'essere registrata nello stesso territorio nazionale italiano, ancora profondamente segnato da differenze regionali, se non provinciali.

Dai documenti d'archivio finora conosciuti – e poco utilizzati – possiamo dedurre l'esistenza a San Paolo nel 1890 di cinque scuole pubbliche, che erano

¹³ *Dispaccio del 2 luglio 1890 del Segretario di Stato al Consigliere della Legazione a Rio de Janeiro*, in ASMAE, AS, POS III, b. 341, f. Scuole italiane sussidiate nello Stato di San Paolo G 184.

¹⁴ *Ibid.*

¹⁵ *Relazione del regio console di San Paolo Conte A. Rozwadowsky del 16 marzo 1890*, in ASMAE, AS 1889-1910, POS III, b. 341, f. Scuole italiane sussidiate nello Stato di San Paolo G 184.

¹⁶ *Ibid.*

state istituite da insegnanti privati, insegnanti che meritavano di essere elogiati perché trasmettevano «un'educazione in italiano ai figli degli italiani e li familiarizzavano con le tradizioni della loro patria»¹⁷. Ma i documenti rivelano anche la presenza di tentativi da parte di migranti appartenenti alle classi più abbienti di promuovere iniziative specifiche, come le «lotterie», per sostenere lo sviluppo delle istituzioni scolastiche. Il console notava con una certa soddisfazione l'emergere di un significativo «risveglio patriottico» e la possibile costituzione di una «grande società tra gli italiani», fatti che inducevano il console a un certo ottimismo¹⁸ anche per la priorità data nel programma della nuova associazione alla creazione di una scuola.

Tuttavia, le relazioni consolari attestano la rapida crescita del numero di scuole pubbliche nell'arco di quindici anni. Anche in questo caso, oltre agli annuari, le relazioni dei consoli rivelano un fenomeno in netta espansione. Alla fine del secolo, il console Enrico Chicco registrava la presenza di circa 50 scuole e 200 insegnanti:

Le scuole italiane sono sorte nella città di San Paolo e in tutto lo Stato, come le imprese e i punti di ristoro, senza alcuna regola o controllo. Basta un epitaffio sulla porta, una sedia, un tavolino e qualche sgabello per proclamare in un articolo della gazzetta che a San Paolo è sorta una scuola italiana¹⁹.

L'elenco delle scuole italiane redatto dal Console Gioia allegato alla relazione del 15 aprile 1900 elencava 70 scuole, con un totale di 3.408 alunni iscritti, di cui 2.811 frequentanti²⁰. Due anni dopo, il nuovo console Monaco rilevava la presenza di 45 scuole nella città di San Paolo e 74 nell'interno. Il numero di alunni era rispettivamente di 2935 e 3400, per un totale di 6335 iscritti²¹. Nel gennaio 1906, il console Pio de Savoia, riferendosi all'anno 1905, indicava in 83 il numero di scuole esistenti, di cui 47 accettavano di essere supervisionate dal consolato di São Paulo, 13 dal viceconsolato di Campinas, 9 da São Carlos do Pinhal, 8 da Riberão Preto, 5 da agenti consolari e 1 dal viceconsole di Santos. La popolazione scolastica ammontava quindi a 5379 alunni, con una media di 65 alunni per scuola. Tuttavia, è interessante notare l'osservazione

¹⁷ *Ibid.*

¹⁸ *Ibid.*

¹⁹ *Relazione Scuole italiane in San Paolo del r. console E. Chicco del 3 maggio 1897*, in ASMAE, AS 1889-1910, POS III, b. 341, f. Scuole italiane sussidiate nello Stato di San Paolo G 184.

²⁰ Elenco delle scuole italiane nella città di San Paolo e nello Stato al 31 marzo 1900 del r. console Gioia, in ASMAE, AS 1889-1910, POS III, b. 341, f. *Scuole sussidiate nello stato di San Paolo fino al 1900 G 184 Contabilità*.

²¹ Associazione Insegnanti Italiani con sede nella Città di San Paolo (Brasile) Elenco nominativo delle Scuole Italiane nella Città e nello Stato di S.Paolo, coi dati statistici per l'anno scolastico 1901-1902. Allegato alla *Relazione del R. console A. Monaco del 22 aprile 1902*, in ASMAE, AS, 1889-1910, CAT. III B, b. 339, fino al 1910 f. *Associazione fra gl'Insegnanti e Circolo Pedagogico*.

del console generale secondo cui il numero di scuole era molto più alto, ma che il rapporto si riferiva solo alle scuole che avevano accettato di sottoporsi al controllo e alla supervisione delle autorità consolari²².

2. La fotografia della molteplicità ed eterogeneità delle scuole di etnia italiana a San Paolo...

D'altra parte, anche la corrispondenza tra il Ministero degli Affari Esteri e le singole sedi diplomatico consolari ci permette di conoscere meglio i profili e le caratteristiche delle scuole elementari italiane nello Stato di San Paolo e dei loro promotori. Non è facile ricostruire i profili e le caratteristiche delle centinaia di scuole e di insegnanti che operarono nella regione di San Paolo, o delle scuole da loro gestite, ma attraverso un'attenta ricognizione e la lettura delle relazioni consolari e dei fascicoli personali degli insegnanti di tutte le scuole italiane all'estero, è possibile recuperare tratti importanti per ricomporre una mappatura non puramente quantitativa, insieme agli itinerari professionali e di emigrazione dei loro fondatori. I fondi archivistici relativi alla componente fondamentale della cultura scolastica all'estero riguardano soprattutto figure che hanno ricoperto il ruolo di preside o di insegnante nelle scuole italiane all'estero gestite dallo Stato: tuttavia, non sono trascurabili le tracce e gli indizi relativi a parte del personale docente e amministrativo contenuti in alcuni archivi personali che fanno riferimento anche alle scuole sovvenzionate. Così, per citare qualche esempio, le fonti conservate sono utili per far luce sul ruolo svolto dal Convitto "Sempre Avanti", creato da Francesco Pedatella, originario di un piccolo paese calabrese, Fiumifreddo Bruzi, dove era nato il 16 dicembre 1859, e che, dopo aver insegnato a Diamante e all'Istituto Vinacci di Cosenza, si trasferì a San Paolo nel 1887 (aveva 29 anni nel 1890), dove decise di creare un convitto per il quale ricevette un sussidio annuale per alcuni anni. La scuola, inizialmente con tre insegnanti, crebbe fino a 14 sezioni distribuite in diversi quartieri della capitale, e la principale funzionò a lungo anche come convitto con corsi regolari di scuola superiore, integrati da scuole serali e festive per i lavoratori. L'obiettivo della direzione era quello di seguire un percorso in linea con i programmi educativi governativi varati in Italia il 25 settembre 1888. Altrettanto interessante è la documentazione relativa all'iniziativa promossa da due sorelle, Emilia e Alda Magrini, emigrate in Brasile nel 1888 e che, giunte a San Paolo nel 1890, aprirono e gestirono per 37 anni la Scuola "Regina Margherita" nel quartiere Braz della capitale. La prima, nata

²² *Le scuole italiane a San Paolo nel 1905. Relazione del console generale Gherardo Pio di Savoia del 6 gennaio 1906*, in ASMAE, AS 1889-1910, POS III, b. 341, f. S. Paolo PG fino al 1910, p. 2.

nel 1847, si era diplomata maestra elementare nel 1869. Dopo aver insegnato a Copparo e Ostellato, in provincia di Ferrara, decise di emigrare in Brasile con la sorella Alda, sei anni più giovane – era nata il 5 gennaio 1853 – che dopo essersi formata come maestra elementare nel 1873 e 14 anni di esercizio professionale tra il 1874 e il 1888 in provincia di Ferrara, decise di unirsi alla sorella. Quella delle sorelle Magrini fu un’esperienza condotta con tale costanza e perseveranza da garantire ad Alda, sopravvissuta ad Emilia che morì nel dicembre 1914, di ottenere alla fine degli anni Venti, un importante riconoscimento da parte del Ministero degli Affari Esteri, che le conferì la medaglia d’oro per i 40 anni di servizio²³. Allo stesso tempo, due coniugi emigrati a San Paolo alla fine del 1893 contribuirono ad aprire, due anni dopo, un collegio per i figli degli emigrati italiani. “Ai Nostri Monti” ebbe vita breve, cinque anni, al termine dei quali, nel 1900, i Nesi tornarono in Italia, ma non senza lasciare traccia della loro breve esperienza, anche dal punto di vista editoriale. Gaetano ed Emma Nesi furono i primi a pubblicare libri di testo adatti alle condizioni dei figli degli italiani in Brasile²⁴. Un’altra esperienza degna di nota fu quella promossa da Luigi Lievore, un insegnante diplomato per l’insegnamento nelle scuole secondarie che, dopo essere emigrato da Vicenza nel 1901 e aver insegnato per tre anni nelle scuole, nel 1904 fondò con la moglie Emma l’Istituto Principe di Piemonte. Un insegnante che si distinse anche per il suo contributo alla creazione dell’associazione degli insegnanti, del circolo pedagogico e per il suo lavoro di segreteria presso il consolato di San Paolo, che gli

²³ ASMAE, AS 1929-1935, b. 719, f. 1928-1929, Circolare (1927). *Circolare n. 127 del 28 novembre 1927. Diplomi di onorificenza delle scuole straniere per gli anni 1925 e 1926. Relazione della Commissione*. Tra il 1872 ed il 1876 Alda aveva insegnato nelle scuole di Copparo, poi dal 1876 al 1878 in quelle di Bagnacavallo in provincia di Ravenna e dal 1876 al 1888 a Codigoro in provincia di Ferrara. Dal 1889 al 1926 si dedicò all’insegnamento a San Paolo del Brasile. Magrini era sposata con Albino Borghi ma nel 1929, all’età di 76 anni, rimasta sola, si rivolse al ministero degli Affari esteri per chiedere un riconoscimento pensionistico vantando, oltre ai 35 anni di insegnamento, anche il conseguimento di tre benemerienze: una medaglia da parte della Società Dante Alighieri, un’altra dalla sede di Roma e una terza dal ministero degli Affari Esteri. Diverse sono le lettere conservate presso l’Archivio storico diplomatico del ministero degli Affari Esteri, a partire da quella scritta da San Paolo del Brasile il 24 ottobre 1929 ed indirizzata al «Duce amatissimo» per chiedere una forma pensionistica o di vitalizio o un sussidio. Istanza presentata verbalmente anche a Piero Parini in occasione del viaggio che svolse in Brasile il direttore degli italiani e delle scuole all’estero. Richieste reiterate fino al 1936 in un contesto di aggravamento delle sue condizioni dopo che dal 1935 viveva con la nipote Augusta, vedova da cinque anni la quale si industriava dando lezioni di pianoforte e ripetizioni a bambini delle scuole italiane di San Paolo ma che avendo quattro figli, uno dieci anni un’altra di 14 anni e due sposate era impossibilitata ad aiutare economicamente la zia. Cfr. Lettera del 13 aprile 1931, del 3 maggio 1933, del cugino Umberto Magrini del 24 aprile 1935 e dell’11 agosto 1936 in ASMAE, AS 1920-1955, Fascicoli personale docente estero non più in servizio, b. 326 *Magrini Alda*.

²⁴ A. Barausse, *Scolarizzazione etnica italiana e cultura scolastica a San Paolo: le iniziative di Gaetano Nesi e Gemma Manetti per gli scolari italiani tra la fine dell’Ottocento e l’inizio del Novecento*, «Inter-Ação», Goiânia, [vol. 46], n. 2, maggio-agosto 2021, pp. 422-440.

valse non poche critiche da parte della classe docente. Un ruolo che però gli fu riconosciuto dalle autorità consolari che, nel 1917, gli affidarono il progetto di riforma del libro di testo per le scuole italiane dello Stato di San Paolo²⁵.

È dunque attraverso l'analisi documentaria che il patrimonio archivistico rivela dinamiche del tutto sconosciute e inedite intorno alle caratteristiche di questa scolarizzazione e alle strategie di governo delle autorità consolari. In più di un'occasione, le autorità consolari segnalavano nelle loro relazioni diverse criticità. Fin dai primi anni del 1890, il console segnalava la presenza di specifiche circostanze locali che impedivano la strutturazione di un'organizzazione didattica e pedagogica non precaria, caratterizzata dall'assenza di scuole divise in classi, dalla presenza di un'unica aula in cui si riunivano contemporaneamente i bambini dai 4 ai 14 anni, inefficace nonostante la normativa nazionale a seguire «un serio programma educativo»²⁶ e poco strutturata, in quanto non esistevano regolari iscrizioni né un calendario definito per l'apertura e la chiusura dei corsi, orari precisi per l'insegnamento.

D'altra parte, queste fonti sono indispensabili non solo per comprendere la complessità del quadro della scolarizzazione etnica sovvenzionata dal governo italiano e le diverse strategie delle autorità consolari nel contesto geografico e politico dello Stato di San Paolo, ma anche i problemi interni alle scuole stesse, la loro cultura e condizione materiale, le dinamiche interne al mondo associativo e agli insegnanti, il confronto e persino lo scontro tra le prospettive presentate dal corpo docente e quelle dei consoli.

I documenti prodotti dai consoli di San Paolo evidenziano alcune importanti criticità nello sviluppo materiale delle istituzioni scolastiche. Le dinamiche che hanno accompagnato lo sviluppo delle scuole sono state complesse e hanno coinvolto diversi ambiti: dal problema degli spazi insalubri e precari all'organizzazione didattica e pedagogica, dalla scarsa qualità degli insegnanti all'indifferenza dei genitori degli alunni, dall'assenza o scarsità di materiale scolastico al più complesso problema della governance scolastica. In più di un'occasione, le autorità consolari ricordano nei loro rapporti una caratteristica specifica delle scuole situate principalmente nel contesto metropolitano della città, quella relativa all'alta mobilità delle scuole. Infatti, l'alto costo degli affitti produceva un fenomeno molto particolare in città, quello del frequente spostamento degli spazi scolastici, tanto che un console definì le scuole come «tende mobili»²⁷. Così, gli scolari erano spesso costretti a rincorrere il movi-

²⁵ *Relazione del 30 dicembre 1917 del Console Giovanni Beverini e Relazione del Prof. Luigi Lievore*, inviata il 16 novembre 1917 al Consolato Generale d'Italia a S. Paolo (Brasile), in ASMAE, AS CAT. III B 1911-1922, b. 446, f. *San Paolo dal 1911*.

²⁶ *Relazione del regio console di San Paolo Conte A. Rozwadowsky del 16 marzo 1890*, in ASMAE, AS 1889-1910, POS III, b. 341, f. *Scuole italiane sussidiate nello Stato di San Paolo G 184*, cit., p. 2.

²⁷ *Le scuole italiane a San Paolo nel 1905. Relazione del console generale Gherardo Pio di Savoia del 6 gennaio 1906*, cit.

mento fisico degli spazi scolastici. D'altra parte, gli stessi insegnanti erano costretti a gestire la forte mobilità degli alunni, riflesso dell'assoggettamento dei genitori alle dinamiche del mercato del lavoro locale. Ma le fonti archivistiche, generalmente poco esplorate, conservano documenti che non solo offrono un quadro accurato delle condizioni materiali delle scuole, ma forniscono anche informazioni sulle pratiche di insegnamento. Quali sono le condizioni materiali delle scuole? Quali erano le condizioni degli edifici e delle aule? Quali materiali didattici erano a disposizione degli insegnanti? È possibile rilevare differenze tra le varie iniziative di istruzione di base promosse nella capitale? È possibile rilevare un quadro diverso tra scuole primarie e secondarie? Qual era l'effettiva disponibilità di materiale didattico? È nei luoghi di conservazione pubblici o privati che è possibile esaminare le relazioni di consoli e insegnanti, i registri, i quaderni scolastici, i libri di testo che, insieme ai diari o alle memorie degli insegnanti e alle relazioni da loro prodotte, arricchiscono il quadro delle risorse disponibili per le ricostruzioni effettuate in questi anni. Alcune prime ricerche sono state condotte negli ultimi anni. Il materiale archivistico ci aiuta a comprendere la circolazione e la distribuzione di materiali didattici, come libri di testo, quaderni, penne, carte da parati e riproduzioni fotografiche dei monarchi, che sono solo alcune delle questioni attorno alle quali le autorità consolari dovettero lavorare²⁸. L'uso e la circolazione dei libri di testo, ad esempio, costituiscono un campo di ricerca per il quale i fondi archivistici italiani possono essere estremamente utili per una più ampia conoscenza della produzione di libri di testo per le scuole italiane di San Paolo. I fondi archivistici sono costituiti anche dalle continue e numerose richieste di nuovo materiale scolastico che accompagnavano costantemente l'attività delle scuole e degli insegnanti, compresi quelli che insegnavano nelle scuole dell'interno dello Stato, come Modesto Martinelli, insegnante della scuola di Iurema, che chiedeva che gli venisse inviata una carta geografica dell'Italia²⁹.

Attraverso gli archivi italiani, possiamo approfondire la conoscenza dei processi di professionalizzazione e sindacalizzazione che interessarono gli insegnanti italiani nello Stato di San Paolo e soprattutto nella capitale. La crescita spontanea e vertiginosa delle scuole pubbliche portò gli esponenti più

²⁸ A. Barausse, *I libri scolastici come strumenti di promozione dell'identità nazionale italiana in Brasile nei primi anni del fascismo (1922-1925)*, «História da Educação», n. 20, 2016, pp. 81-94; Id., *Escolas étnicas, italianidade e livros escolares entre o final do século XIX e o início do século XX. O caso de São Paulo e do Sillabario de leituras "I Piccoli italiani in Brasile" por Gaetano Nesi e Gemma Manetti*, in *Revolução, modernidade e memória. Caminhos da História da Educação*, XIV Congresso Iberoamericano de História da Educação, Lisboa, Edição HISTEDUP, 2021, pp. 405-426; Id., «Una impronta di italianità»: os livros didáticos para as escolas étnicas italianas no Brasil entre o liberalismo e o fascismo / «Una impronta di italianità»: the textbooks for Italian ethnic schools in Brazil between liberalism and fascism, «Cadernos de História da Educação», vol. 18, n. 2, 2019, pp. 329-350.

²⁹ Domanda del sig. Martinelli insegnante in Iurema S. Paolo (Brasile) del 17 novembre 1911, in ASMAE, AS 1888-1920, Cat. III B 1911-1922, b. 446, f. Dal 1911 San Paolo.

dinamici del contesto pedagogico della colonia a promuovere la costituzione di una «Associazione degli insegnanti italiani di San Paolo» e di un'altra società chiamata «Circolo pedagogico». Organizzazioni di cui i documenti d'archivio ci permettono di conoscere obiettivi e dirigenti; realtà associative che sono il termometro del consolidamento dello sviluppo della rete di scuole italiane nella capitale e nello Stato di San Paolo³⁰. Ma furono anche oggetto dell'attenzione e delle strategie dei consoli. Nel maggio del 1901 il console di San Paolo, Attilio Monaco, inviava al ministero la comunicazione della nascita dell'organizzazione che, oltre a riunire gli insegnanti, contava inizialmente 25 scuole, numero che si ampliò fino a comprendere le scuole delle aree interne, raggiungendo prima le 80, con 3.500 alunni iscritti, e poi le 90, con un totale di 6.048 alunni iscritti³¹. L'iniziativa fu sostenuta e patrocinata dalle stesse autorità consolari perché, nella strategia di Monaco, il tentativo di «riunire, ordinare e disciplinare, per quanto le condizioni della Colonia lo permettono, tutto questo sforzo, questa disarticolazione e questo elemento di italianità sarebbe stato un bene immediato per gli insegnanti e per gli alunni»³². Lo scopo dell'associazione, approvata con entusiasmo dal ministro Prinetti³³ non era solo quello di «unire gli insegnanti italiani dello Stato di San Paolo» o di «diffondere la lingua e la cultura del Paese»³⁴, motivo per cui fu costituita presso il Comitato Dante Alighieri di Roma. Ma anche per svolgere una vera e propria funzione di gestione e coordinamento delle scuole italiane. Si trattava di dare un indirizzo più stabile alle varie scuole, cercando di raggrupparle e di fonderle in istituti meglio attrezzati con insegnanti, materiale scolastico, strutture, ecc. Raccogliere doni e offerte di libri e denaro per formare un ufficio di lettura; organizzare conferenze, feste scolastiche, ecc.»³⁵. Potevano aderire gli insegnanti delle scuole italiane di San Paolo che esercitavano la professione e adottavano i programmi didattici dell'associazione. Inizialmente, le autorità consolari si affidarono al sodalizio per cercare di promuovere un governo più efficace delle scuole: infatti, il primo statuto dell'associazione fu modificato dal console monegasco «man mano che il malcontento e le divisioni tra

³⁰ Circolo Pedagogico Italiano, *Statuto dell'Associazione degli Insegnanti di Italiano di San Paolo*, Tipografia Italiana N. Fortunati, 1902, in ASMAE, b. 341, sf. [*Scuole italiane sussidiate nello Stato di San Paolo*] fino al 1900 G. 184.

³¹ Relazione 22 aprile 1902 [della] Associazione Insegnanti Italiani con sede nella Città di San Paolo (Brasile). Elenco nominativo delle Scuole Italiane nella Città e nello Stato di S. Paolo, coi dati statistici per l'anno scolastico 1901-1902, in ASMAE, AS, 1889-1910, CAT. III B, b. 339, fino al 1910, f. *Associazione fra gl'Insegnanti e Circolo Pedagogico*.

³² *Ibid.*

³³ Dispaccio del ministro Prinetti del 12 agosto 1901, in ASMAE, AS, 1889-1910, CAT. III B, b. 339, fino al 1910, f. *Associazione fra gl'Insegnanti e Circolo Pedagogico*.

³⁴ *Statuto dell'Associazione fra gli Insegnanti Italiani di S. Paolo (Brasile)*, S. Paulo, Tip. Progresso de Henr. Scheliga & C., 1901, p. 3, in ASMAE, AS, 1889-1910, CAT. III B, b. 339, fino al 1910, f. *Associazione fra gl'Insegnanti e Circolo Pedagogico*.

³⁵ *Statuto dell'Associazione degli Insegnanti di Italiano di San Paolo*, cit., p. 3.

i membri dell'Associazione degli insegnanti italiani tendevano ad aggravarsi, per evitare scandali, che non avrebbero certo giovato al prestigio delle nostre scuole»³⁶. La gestione e l'amministrazione della società erano affidate a una deputazione scolastica composta da quattro membri e dal regio console, che fungeva da presidente. Dei quattro membri del comitato, almeno due dovevano essere insegnanti appartenenti all'associazione e nominati su proposta del console. Successivamente, però, le autorità consolari intervennero per introdurre alcune modifiche al fine di rendere la funzione di coordinamento e controllo più efficace e, soprattutto, diretta, non solo nella distribuzione dei sussidi, ma anche nelle attività³⁷.

La condizione e la preparazione degli insegnanti, invece, costituì un problema serio per le autorità consolari: la loro professione era accompagnata da un forte spirito competitivo, nonostante ci fossero «pochi laureati e pochi anche quelli che, laureati o meno, meritano di essere chiamati insegnanti»:

Quando arrivai qui, all'inizio del 1903, questi padroni erano una vera ferita. Sembravano avere il diavolo in corpo, ogni giorno c'erano liti, urla, dentro e fuori il Consolato, polemiche sui giornali – e che «richieste ridicole, ribellioni». Per disciplinare i rapporti con gli insegnanti, il Console iniziò a ricostruire i percorsi biografici dei singoli docenti, in modo da indurre molti di loro ad abbandonare il terreno della polemica e ad accettare e riconoscere l'autorità consolare. Allo stesso tempo, stabilì l'assegnazione dei sussidi, cercando di favorire i migliori ed eliminare gli «elementi di qualità inferiore». La situazione sembrava migliorata, ma, come caratteristica costante, «la concorrenza che i maestri fanno tra loro e che deve essere scoraggiata e superata, almeno in qualche misura, come quella che ha lo scopo di derubare reciprocamente gli alunni, approfittando della pigrizia, dell'avarizia e dell'ignoranza dei genitori ai quali, in genere, per spendere poco, non importa che i figli frequentino una scuola e non un'altra»³⁸.

3. ...la sua governance e le strategie delle autorità consolari

I documenti consolari ci permettono di comprendere le differenze nella valutazione delle condizioni e delle valutazioni delle scuole di etnia italiana. Il giudizio sul valore delle scuole non fu sempre omogeneo e divenne più complesso nel corso degli anni tra i numerosi consoli che si succedettero alla guida del consolato. Roznadowski, Brichanteau, Bertola, Gioia, Pio di Savoia, Pietro Baroli, Angiolo Dall'Aste Brandolini, Ugo Tedeschi, Giovan Battista Dolfini: ognuno di loro prestò un'attenzione diversa al fenomeno che inizialmente fu

³⁶ Scuole italiane esistenti nello Stato di San Paolo. Annesso al rapporto del R. console A. Monaco del 15 settembre 1902, in ASMAE, AS, POS III, b. 341, f. *fino al 1900*.

³⁷ *Ibid.*

³⁸ Le scuole italiane a San Paolo nel 1905. *Relazione del console generale Gherardo Pio di Savoia del 6 gennaio 1906*, cit., p. 4.

considerato piuttosto oscillante. L'impressione è che, nel periodo compreso tra l'inizio degli anni della grande emigrazione e il fascismo, prospettive diverse animassero i consoli italiani a San Paolo. Le sensibilità e gli approcci al valore e al ruolo della scuola sembravano diversi. Pio di Savoia fu molto chiaro nel sottolineare che «non condivido il disprezzo che molti, senza riflettere e senza sufficiente conoscenza dei fatti, professano nei loro confronti». Alcune erano considerate «veramente buone e molto discrete». Le scuole elementari che ebbe modo di visitare in Italia non erano di maggior valore.

Nel complesso, però, non ho difficoltà ad associarmi a coloro che hanno scoperto che queste scuole valgono poco; Ma se si pensa che si tratta di insegnanti improvvisati, di scolari reclutati nelle famiglie dei poveri che oggi sono qui e domani sono a caccia di lavoro, se si pensa che insegnanti e scolari hanno ricevuto solo un sostegno insignificante e che non ci si può aspettare miracoli da nessuno, Io credo che queste scuole, così come sono, meritino tutta la simpatia dei galantuomini e delle persone di buon senso e che tutti dovremmo cercare di fare qualcosa per loro e portare ciascuno una goccia d'olio a quelle povere lampade sospese nel buio, simbolo anche di quella fede che tutti abbiamo nei destini della patria³⁹.

Tuttavia, solo raccogliendo sistematicamente questi resoconti sarà possibile arricchire il corpus di conoscenze sulle molteplici dinamiche che hanno accompagnato il consolidamento, lo sviluppo e la crisi delle iniziative di scolarizzazione nei diversi Stati della federazione brasiliana interessati dal fenomeno migratorio e a San Paolo, che si distingue per caratteristiche specifiche rispetto agli altri Stati della federazione. Sono molti gli aspetti offerti da queste fonti per meglio articolare le chiavi di lettura del fenomeno oggetto di studio e comprendere le dinamiche che hanno ritardato o promosso la scolarizzazione.

Per meglio comprendere l'importanza delle fonti consolari per una più precisa ricostruzione delle strategie di sviluppo e consolidamento delle scuole, è sufficiente soffermarsi su tre documenti rilevanti. Interessante, per comprendere le dinamiche e le problematiche spesso complesse che le autorità consolari dovettero affrontare, è il documento con cui il console Gherardo Pio di Savoia, all'inizio del suo mandato, nei primi mesi del 1903, annunciava l'intenzione di adottare una serie di misure, che iniziavano con altre modifiche allo statuto dell'Associazione per garantire, a suo avviso, una gestione meno tesa. Il console scrisse:

Signor Ministro

Sono poche settimane soltanto che mi trovo alla direzione di questo travagliatissimo ufficio; contutto ciò, ricordandomi delle raccomandazioni fattemi a Roma, personalmente, da S.E. il Sottosegretario di Stato e dall'Ill.mo Signor Ispettore Generale delle scuole italiane all'estero, avrei voluto pormi in grado d'inviare questo rapporto anche prima e lo avrei fatto se non avessi trovato: la questione delle scuole in questo Stato già pregiudicata,

³⁹ Le scuole italiane a San Paolo nel 1905. *Relazione del console generale Gherardo Pio di Savoia del 6 gennaio 1906*, cit., pp. 4-5.

imbrogliatissima; un ordinamento scolastico regolato da uno statuto che più si studia e più appare straordinario ma che il Superiore Ministero, pur non senza molte riserve, approvava e che quindi per me è legge; dei maestri che hanno accettato quello statuto e che si sono imposti un piccolo sacrificio pecuniario per godere eventualmente dei vantaggi che loro assicura; degli altri maestri che lo hanno respinto e combattuto e che ancora lo combattono; degli altri ancora che, dopo di averlo accettato se ne sono discostati per far causa comune coi dissidenti; infine una organizzazione scolastica che ha suscitato una quantità di polemiche, di discussioni appassionate, di opposizioni più o meno ragionevoli o interessate; la babilonia, il caos. Se invece di tutto ciò, arrivando qui, avessi trovato il terreno vergine, mi sarei regolato nel modo e secondo i principii che seguono, senza perdere un minuto di tempo, senza dubbi od incertezze, salvo ben inteso, a fare la volontà del Superiore Ministero quando fosse stata diversa dalla mia. Avrei ragionato così: dal momento che il Governo Italiano sussidia le scuole dello Stato di S. Paolo con libri e con denaro, esso ha diritto di sapere a chi accorda il suo sussidio e di stabilire le condizioni del sussidio stesso. Siccome però si tratta di scuollette italiane in paese straniero, private, libere, popolari, elementarissime, le pretese del Governo e le condizioni imposte ai maestri per essere giuste e pratiche, dovranno essere limitatissime, proporzionate all'entità del sussidio accordato, ed alla natura stessa delle singole scuole. Ora, per distribuire un poco di materiale scolastico e qualche sussidio, per sorvegliare i maestri perché facciano quel poco che si sono impegnati di fare, ecc., il R. Console di S. Paolo, rappresentante del Governo Italiano, non avrà bisogno di uno statuto speciale, ne' di istituire un'associazione fra gl'insegnanti di S. Paolo col vincolo della mutualità, ne' di obbligare questi maestri ad accettare il Console Generale come presidente effettivo e a tollerare che nomini egli stesso la deputazione che dovrà amministrare e dirigere la associazione, ecc.; egli stesso potrà provvedere alla esecuzione del modesto programma preindicato. Senonché trattandosi non di poche scuole, ma di decine e decine anzi di centinaia di scuole, al benessere delle quali è anche opportuno interessare quante più persone è possibile, egli si circonda di una commissione scolastica consultiva composta di un buon numero di membri che lo aiuterà coll'opera e col consiglio, ma soprattutto coll'opera, prestandosi i suoi membri a visitare le scuole, a riferire intorno le stesse, ad organizzare festicciole scolastiche, sottoscrizioni, ecc. Per corrispondere poi coi maestri, protocollare le lettere in arrivo e in partenza, raccogliere le relazioni dei commissari, tenere i registri di contabilità di processi verbali delle riunioni, rilasciare ricevute, diramare circolari, raccogliere dati statistici, compilare statistiche ecc. ecc., il R. Console si servirà dell'opera di un segretario pagato. All'interno poi dello stato il R. Console moltiplicherà l'opera sua e della commissione incaricando i rr. viceconsoli e i rr. agenti consolari di fare altrettanto, i primi nei loro rispettivi distretti, i secondi nel luogo di loro residenza. Questo sarebbe stato il programma che avrei adottato arrivando qui, in terreno vergine, e che meglio di ogni altro mi sembrerebbe suscettibile di una vigorosa applicazione. Invece disgraziatamente mi trovo colle mani legato dallo Statuto; epperò dopo di avere sostenuta una vera lotta con me stesso; dopo di avere lungamente pensato e ripensato a ciò che avrei potuto fare per sollevare queste nostre scuole dallo stato miserissimo, ma non disperato, in cui si trovano; dopo di avere scritto e stracciato più di un rapporto, ho finito per rassegnarmi a continuare l'opera del mio predecessore, ritoccandola, modificandola, migliorandola, anziché ricominciare ex novo, come ero continuamente tentato di fare. D'altra parte l'anima delle scuole, soprattutto trattandosi di scuollette private, elementarissime, non è l'ordinamento scolastico cui per avventura si sottopongono; sono lo zelo del maestro, la diligenza, la coscienza e l'attività delle persone preposte allo solo sorveglianza. Io farò quanto dipende da me per provarlo coi fatti [...]⁴⁰.

⁴⁰ Rapporto del R. console G. Pio di Savoia del 5 marzo 1903. *Programma scolastico per il*

Il secondo documento si riferisce al programma di riorganizzazione generale poi attuato dallo stesso Console Pio Gherardo di Savoia per la gestione generale delle scuole italiane a San Paolo durante il suo mandato, tra il 1903 e il 1905. Si tratta di un piano che prevedeva interventi a vari livelli: dalla gestione amministrativa a quello della didattica e finanziaria. In particolare, il Console sciolse l'Associazione degli insegnanti e approvò un nuovo Statuto, insieme alle *Norme pel funzionamento delle scuole italiane nello Stato di San Paolo*, volto a garantire un maggiore controllo nella gestione e nella supervisione delle scuole, affidate alla Deputazione scolastica⁴¹.

Il progetto generale di riorganizzazione delle scuole portava anche a un miglioramento dell'intervento finanziario dello Stato italiano, attraverso la predisposizione di un piano finanziario basato sulla possibilità di sovvenzionare un numero complessivo di dieci scuole cercando di favorire un processo di aggregazione e fusione tra le scuole. Le quattro scuole interne erano quelle di Campinas, Santos, São Carlos do Pinhal e Riberão Preto. Accanto ad esse, si sarebbero dovute scegliere le sei scuole situate in città, che avrebbero dovuto ottenere progressivamente una sovvenzione più consistente. In alcuni casi, la strada suggerita era quella di incoraggiare la responsabilità diretta della gestione delle scuole da parte di associazioni caritatevoli e di mutuo soccorso, come è avvenuto a Santos con l'associazione italiana e a Campinas con il Circolo unito d'Italia. Infine, il sistema prevedeva la possibilità di sovvenzionare il resto delle scuole situate nei centri più piccoli e rurali attraverso il materiale scolastico⁴².

Durante il suo mandato, il console introdusse anche nuovi criteri per la distribuzione dei sussidi, definendo una vera e propria griglia, che comprendeva i titoli di studio del maestro, le qualità didattiche e i precedenti del maestro (che fosse o meno in possesso di una licenza), i meriti della storia della sua scuola, l'anno di fondazione della scuola, la condotta del maestro in Brasile e, soprattutto, durante l'anno scolastico, il numero degli alunni, lo stato dei locali, l'igiene, ecc. dei locali, le interruzioni dell'insegnamento, il giudizio generale sull'insegnamento (educazione e istruzione) derivante dalle visite alle scuole durante l'anno, gli esami⁴³.

Infine, per garantire la distribuzione del materiale scolastico, il console sviluppò un progetto molto interessante e pionieristico di riforma della fornitura

1903, in ASMAE, AS, 1889-1910, CAT. III B, b. 339, fino al 1910 f. Associazione fra gl'Insegnanti e Circolo Pedagogico.

⁴¹ Per le scuole italiane. Anno Scolastico 1906. *Relazione del Console Gherardo Pio di Savoia al Ministro degli Affari Esteri del 29 luglio 1906*, cit.

⁴² Le scuole italiane a San Paolo nel 1905, in *ibid.*, p. 11.

⁴³ *Ibid.*, p. 20; *Relazione del Console Gherardo Pio di Savoia al Ministro degli Affari Esteri del 29 luglio 1906*. Per le scuole italiane. Anno Scolastico 1906, cit., p. 7.

dei libri di testo, che mirava a spostare il centro di produzione dall'Italia al Brasile⁴⁴.

Il processo di riorganizzazione, attuato solo in parte, sembrò dare alcuni risultati iniziali. Secondo un rapporto del 1906, sia gli insegnanti che le società di mutuo soccorso che gestivano le scuole avevano raddoppiato gli sforzi per «meritare la benevolenza di questo Consolato e del Ministero Superiore». I primi furono indotti a cercare una sede più comoda o i banchi più adatti o altri arredi scolastici, e le seconde a dotarsi di personale docente sufficiente per essere aiutate nell'insegnamento. Entrambi osservarono una disciplina «alla quale non erano stati abituati prima, come dimostrano le continue polemiche sui giornali, tutte fatte di pettegolezzi, personalismi, insulti e contumelie»⁴⁵.

L'alto tasso di conflitti tra insegnanti sembrava essere tornato a livelli accettabili. Non che le polemiche fossero del tutto scomparse, ma ora sembravano limitate e create principalmente da insegnanti che non volevano accettare il controllo del consolato. Infine, l'opinione sulle scuole di etnia italiana era rimasta positiva:

Piaccia o no, così come sono, con tutti i loro difetti – non mi stancherò mai di dirlo – hanno segnalato i servizi alla causa nazionale nella lotta contro l'analfabetismo e contro l'indifferenza della maggioranza per tutto ciò che riguarda il decoro della patria. È a queste scuole che, volenti o nolenti, dobbiamo se migliaia e migliaia di bambini italiani nello Stato di San Paolo sanno leggere e scrivere in italiano⁴⁶.

4. *La missione di Arturo Magnocavallo per la realizzazione di un istituto medio: la fotografia delle scuole italiane di San Paolo*

Alla luce dello scenario delineato dal Console Pio di Savoia, colpisce l'analisi prodotta in un'altra relazione di appena un anno dopo da un funzionario italiano inviato a San Paolo dal consiglio centrale della Società Dante Alighieri con il preciso compito di esaminare analiticamente la struttura delle scuole, l'ambiente, le esigenze della colonia, i modi e i mezzi migliori per valutare l'opportunità o meno di creare una scuola secondaria, la futura scuola media "Dante Alighieri"⁴⁷. Si tratta di un documento straordinario prodotto da Arturo Magnocavallo⁴⁸, che merita di essere pubblicato integralmente e che fa

⁴⁴ Per le scuole italiane. Anno Scolastico 1906. *Relazione del Console Gherardo Pio di Savoia al Ministro degli Affari Esteri del 29 luglio 1906*, cit., p. 19.

⁴⁵ *Ibid.*, p. 5.

⁴⁶ *Ibid.*, p. 1.

⁴⁷ *Relazione a S.E. il Ministro dell'Ispettorato Generale delle Scuole Italiane all'Estero Scalabrini del 14 aprile 1908*, in ASMAE, AS 1888-1920, Cat. III B 1911-1922, b. 446, f. Dal 1911 San Paolo, sf. Istituto Medio.

⁴⁸ Arturo Magnocavallo nacque a Milano il 18 agosto 1873. Coniugato con Armida Brun

luce su un quadro ancora più articolato di quello presentato dal console Pio di Savoia:

Nella sola città di San Paolo ci sono attualmente circa settanta scuole elementari italiane. Tante, anzi troppe, ma quante meritano di essere chiamate scuole? Quante sono in grado di rispondere alle più modeste esigenze della colonia? È inutile illudersi: non si tratta di vere e proprie scuole, ma di una settantina di persone che esercitano, o meglio fingono di esercitare, la professione di maestro, persone che per la maggior parte non si chiamano adatte all'insegnamento e che talvolta non hanno la minima preparazione per insegnare⁴⁹.

Il ricco e articolato documento presenta non solo dati significativi sullo sviluppo quantitativo delle scuole, ma anche diverse valutazioni sulle caratteri-

ebbe una figlia, Ada, nata il 15 settembre 1904 e fu il fratello della più nota maestra Maria Magnocavallo. Nell'aprile del 1907 per un accordo tra la Direzione Generale delle Scuole Italiane all'Estero, il Commissariato dell'Emigrazione e la "Dante Alighieri", con il consenso del ministero della Pubblica Istruzione, Magnocavallo fu inviato a San Paolo per compiere gli studi riguardanti la fondazione dell'Istituto Medio. Si era laureato in lettere alla facoltà dell'università di Milano a pieni voti ed aveva ottenuto il premio *Lattes* nel 1897. Nel 1898 fu nominato per concorso insegnante di storia e geografia nelle scuole medie. Comandato nel 1902 e 1903 presso il Museo nazionale romano per la preparazione del Congresso Internazionale di Scienze Storiche, che ebbe luogo a Roma nel 1903 passò, nel 1905, dai ruoli di insegnante di scuola media a quelli dell'amministrazione centrale di 1 categoria quale vice-segretario. Un ruolo che occupò fino al 1912 quando fu nominato a seguito di concorso, provveditore agli studi e destinato a Messina fino all'aprile del 1914. In quell'anno fu chiamato a prestare servizio presso la Direzione generale di Sanità come segretario della commissione mista (ministero dell'Interno e ministero dell'Educazione) per l'igiene scolastica. Successivamente, nel 1915 fu assegnato come provveditore a Como e successivamente, nel 1917 a Brescia incarico che tenne fino al 1920 quando Magnocavallo, su invito della Società "Dante Alighieri" e in accordo con l'imprenditore italiano emigrato a San Paolo Rodolfo Crespi, fondatore e finanziatore dell'Istituto medio, sostituì il prof. Camuri e ricoprì la funzione di direzione dell'istituto, dal 1° dicembre 1920 al 15 settembre 1932. Fu allora che i vertici ministeriali decisero il suo trasferimento ad Atene. Nel maggio del 1932, infatti, il ministero decise di provvedere alla riorganizzazione dell'Istituto medio italiano di San Paolo, operazione che non sarebbe stata possibile – secondo il direttore generale degli italiani e delle scuole all'estero Piero Parini – senza procedere ad «oculata selezione del personale insegnante [...] parte addirittura in contrasto coi principi dell'Italia nuova, parte ad essi indifferente o estranea». La rimozione di Arturo Magnocavallo «pur essendo egli ottimo italiano e personalmente di sentimenti favorevoli al Regime», si rese indispensabile come atto propedeutico per un «radicale rinnovamento» dell'Istituto. Il preside ricevette la proposta da parte del direttore generale degli italiani e delle scuole all'estero, di rientrare e di essere ricollocato per collaborare alla istituzione di nuovi licei nel bacino del mediterraneo o presso la direzione generale del ministero. Nel 1935, il 5 novembre, ottenne l'incarico di preside effettivo dell'istituto di Atene che mantenne fino al 1938 quando fu inviato a Londra a dirigere la scuola media. Collocato a riposto il 16 ottobre 1938 tenne l'incarico della presidenza con l'indennità di 20 mila annue lire dove insegnava per 14 ore settimanali senza retribuzione. Lettera di A. Magnocavallo a P. Parini da San Paolo, 5 febbraio 1932, in ASMAE, AS 1920-1955, Fascicoli personale docente estero non più in servizio, b. 325 Magnocavallo Arturo. Cenni in C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005, pp. 18 e 21.

⁴⁹ A. Magnocavallo, *L'istituzione di una Scuola media italiana in S. Paulo (Brasile). Relazione al Consiglio Centrale del Prof. Arturo Magnocavallo*, Roma 4 ottobre 1907, p. 8, in ASMAE, AS 1888-1920, Cat. III B 1911-1922, b. 446, f. Dal 1911 San Paolo, sf. Istituto Medio.

stiche del fenomeno della scolarizzazione etnica italiana per le classi popolari. Ciò che è interessante notare, tuttavia, è la prospettiva su cui si basa la valutazione di Arturo Magnocavallo. Il funzionario italiano, infatti, ci fornisce un'immagine molto negativa della situazione, ben lontana da quella «eroica» che gli insegnanti o le stesse autorità consolari erano soliti presentare nelle loro relazioni o nei loro discorsi pubblici. Un rapporto dal quale emerge un quadro molto negativo delle scuole italiane, considerate «assolutamente inadeguate allo scopo cui erano destinate», sia in termini numerici che organizzativi⁵⁰. Esaminando un documento come il *Rapporto Magnocavallo*, viene da chiedersi quali siano le ragioni che hanno portato il funzionario a presentare una visione esasperatamente negativa della scuola etnica italiana nello Stato di San Paolo. E le risposte probabilmente risiedono nelle ragioni stesse della sua missione, funzionale al progetto perseguito da una parte dell'associazione, quella della Società «Dante Alighieri», di creare una scuola media per l'educazione dei figli dell'élite, anche in vista del ritorno in Italia per acquisire una formazione universitaria. Si tratta di una prospettiva basata su una visione del ruolo dell'istruzione fortemente ancorata alla concezione che i gruppi liberali volevano imprimere al sistema scolastico nazionale italiano, a partire dal modello *casatiano* di educazione scolastica, articolato in percorsi ben distinti da assegnare alle élite da quelli destinati alle classi inferiori⁵¹. Si trattava di un progetto funzionale a una prospettiva che rifletteva la visione della componente più orientata a favorire una strategia di «rafforzamento della nostra influenza in quella regione» attraverso lo sviluppo di un'istituzione educativa per la nascente borghesia italo-paulista, in grado di competere con analoghe strutture di istruzione secondaria straniera, in particolare quella francese⁵². Ma una scelta che avrebbe condizionato la possibilità di destinare in futuro risorse alle scuole elementari. Non è un caso che gli esponenti più dinamici del mondo magistrale dell'emigrazione di San Paolo non abbiano esitato, in un primo momento, ad attaccare la prospettiva di fondare un istituto che aveva trovato il suo principale sostenitore in un rappresentante del mondo imprenditoriale italiano di maggior successo del contesto paulista, Rodolfo Crespi⁵³.

Il documento redatto da Arturo Magnocavallo avrà un notevole impatto anche negli anni successivi. All'inizio del 1922, in vista della riforma scolastica nelle Americhe avviata dalla Direzione Generale del Ministero degli Affari

⁵⁰ *Ibid.*

⁵¹ Sul modello casatiano di scuola si rinvia a G. Talamo, *La scuola dalla legge Casati all'inchiesta del 1864*, Milano, Giuffrè, 1960; M.C. Morandini, *Da Boncompagni a Casati: la costruzione del sistema scolastico nazionale (1848-1861)*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 28-35.

⁵² *Relazione a S.E. il Ministro dell'Ispettore Generale delle Scuole Italiane all'Estero A. Scalabrini del 14 aprile 1908*, in ASMAE, b. 446, f. Parte Generale, sf. Istituto medio.

⁵³ A. Dell'Aira, *Lungo studio grande amore*, Soveria Mannelli, Rubbettino, 2012.

Esteri italiano, il Console a San Paolo invierà una relazione «riservatissima» in cui riprenderà e richiamerà l'analisi e le conclusioni contenute nella relazione del funzionario per esprimere ancora una volta un giudizio piuttosto severo sulla gestione governativa della scuola che «ha sempre risposto, come risponde tuttora, a criteri di meschina politica e di convenienza locale, invece di rispondere a criteri veramente logici, razionali, culturali e didattici». Parla di «misere scuole pubbliche (che, salvo rare eccezioni, sono tutte così)» finalizzate più a garantire il «sostentamento del maestro titolare e della sua famiglia» che veri e propri strumenti «di educazione e istruzione italiana». Il console rilevava la presenza di «un dannosissimo equivoco» nel ritenere che esistessero «vere scuole italiane, organizzate secondo i nostri sistemi didattici, pedagogici e igienici», con lo scopo di fornire educazione e istruzione a bambini italiani ed eventualmente stranieri⁵⁴.

Il rapporto redatto da Arturo Magnocavallo si iscrive nel più ricco patrimonio documentario conservato dall'archivio storico diplomatico del Ministero degli Affari Esteri per esplorare la storia non solo dei percorsi destinati ai figli dei tanti lavoratori italiani emigrati, ma anche di quelli destinati a ruoli dirigenziali o alle professioni imprenditoriali. Diverse sono le carte che ci raccontano i progetti e le sperimentazioni avviate per sostenere l'istruzione secondaria nella capitale. Prima dell'Istituto medio "Dante Alighieri", esisteva un antico ginnasio italo-brasiliano, "Ordem e Progresso", fondato nel 1903 dall'ingegnere Federico Spicacci, che nel 1910 ricevette il titolo nobiliare dal governo locale. Lunga e laboriosa fu la preparazione che condusse alla nascita dell'Istituto medio "Dante Alighieri", su cui è stato condotto un primo interessante studio da parte di Dell'Aira⁵⁵. Molti aspetti della vita dell'istituto, tuttavia, devono ancora venire alla luce, proprio incrociando i documenti conservati nell'archivio scolastico dell'attuale istituto di istruzione con quelli conservati presso il Ministero degli Affari Esteri, a integrazione del fondo documentario conservato presso la Società "Dante Alighieri", l'ente che ne promosse la nascita. I documenti dell'Archivio Scuole del ministero degli Affari Esteri ci permettono di integrare ciò che conosciamo e di far luce sull'intensa dialettica che ha accompagnato la nascita dell'istituto secondario. L'ipotesi e, successivamente, la realizzazione del progetto di creare una scuola media non fu indolore, ma piena di polemiche, se non di veleni. Il progetto, le sue incertezze e le polemiche prodotte durante le varie visite ispettive e preparatorie furono ben rappresentati dalle relazioni consolari, come quella del console Baroli⁵⁶. È solo alla luce di questi conflitti che possiamo comprendere l'esultanza

⁵⁴ Telespresso del 23 maggio 1922. *Vigilanza sulle scuole sussidiate-riservatissima del console*, in ASMAE, b. 446, f. Parte Generale, sf. Istituto medio.

⁵⁵ Dell'Aira, *Lungo studio grande amore*, cit.

⁵⁶ *Rapporto del R. console P. Baroli del 24 ottobre 1911*, in ASMAE, AS CAT. III B 1911-1922, b. 446, f. *Dal 1911 San Paolo*.

del primo rettore dell'Istituto medio, che nel 1913 si espresse all'inaugurazione del secondo semestre del nuovo istituto con le seguenti parole

Il successo morale è stato pienamente raggiunto. Anche tra i più scettici, la fede nel successo dell'esperimento si è risolta; le rane hanno smesso di gracidare; si confidava in un solenne fiasco; invece, bon gré mal gré, si è dovuto assistere a un trionfo completo. L'istituto non è più un pio desiderio, ma un fatto compiuto, che ha letteralmente stupito sia gli esaltatori che i denigratori⁵⁷.

Ma i documenti d'archivio ci aiutano anche a conoscere meglio alcune dinamiche legate alla vita interna dell'istituto, di cui sappiamo ancora poco: dalla struttura societaria dell'istituto all'articolazione didattico-pedagogica degli insegnamenti e ai profili del corpo docente. Così, attraverso la corrispondenza scambiata tra la Direzione Generale del Ministero, il Regio Consolato Italiano di San Paolo, la Società "Dante Alighieri" e i dirigenti e i donatori della scuola, è possibile scorgere tentativi di modificare l'assetto proprietario dell'istituto, come quello che portò Rodolfo Crespi, nel 1917, a redigere e inviare a Roma alcune proposte di modifica del consiglio di amministrazione, che suscitavano non poche perplessità all'interno della "Dante Alighieri", che non era disposta ad avallare la proposta, interpretata come un tentativo di spostare gli equilibri a favore degli oblatori italo-brasiliani e mettere in minoranza la Società "Dante Alighieri"⁵⁸. Allo stesso tempo, l'esame dei programmi e delle relazioni dei direttori scolastici ci permette di conoscere l'evoluzione del piano di studi prima dell'avvento del fascismo e, soprattutto, alla luce dei cambiamenti introdotti dalla riforma del ministro Gentile nel 1923⁵⁹. Un percorso che fu gestito, fino al 1932, proprio da Arturo Magnocavallo nominato sin dal 1920, preside dell'Istituto.

5. *La relazione*

Il documento prodotto da Arturo Magnocavallo costituisce, dunque, il momento iniziale di un processo che maturò solo qualche anno dopo. Si tratta di un rapporto predisposto su mandato del consiglio centrale della Società "Dante Alighieri", del ministero degli Affari Esteri e del Commissariato per l'emigrazione. Il documento è costituito da 92 pagine dattiloscritte e prevede-

⁵⁷ Il direttore Camuri alla Presidenza della Società Dante Alighieri 17 marzo 1913, in ASMAE, AS CAT. III B 1911-1922, b. 446, f. Dal 1911 San Paolo.

⁵⁸ *Rapporto trasmesso dal Console Angiolo Dall'Aste Brandolini il 14 novembre 1916*, in ASMAE, AS CAT. III B 1911-1922, b. 446, f. Dal 1911 San Paolo.

⁵⁹ L'istituzione di una Scuola media italiana in S. Paulo (Brasile). Relazione al Consiglio Centrale del Prof. Arturo Magnocavallo, Roma 4 ottobre 1907, in ASMAE, AS CAT. III B 1911-1922, b. 446, f. *San Paolo dal 1911*, sf. Istituto medio.

va, a corredo, degli allegati che, tuttavia, non sono stati conservati nel fascicolo del fondo dell'archivio storico diplomatico del ministero degli affari Esteri dove è stato ritrovato. Si tratta di una seconda copia, consegnata al direttore delle scuole italiane all'estero, Angelo Scalabrini: probabilmente una copia fu consegnata alla Società «Dante Alighieri». La trascrizione integrale del documento non riporta le note critiche ampiamente sviluppata in questa sezione introduttiva.

Società Dante Alighieri
Consiglio Centrale

L'istituzione di una scuola media italiana in San Paulo (Brasile) Relazione al Consiglio
Centrale del prof. dr. Arturo Magnocavallo

Roma, 4 ottobre 1907

Copia n. 2

Ill.mo Sig. Presidente,

Partito da Genova il 9 maggio u. s. sul piroscavo «France», arrivai nella città di S. Paulo il 28 dello stesso mese.

Fu per me gran fortuna che a bordo del medesimo piroscavo si fosse imbarcato il nuovo Console Generale d'Italia in S. Paulo, nobile Cav. Pietro Baroli, poiché, pur non potendo darmi schiarimenti o notizie sulle condizioni di quella colonia italiana che ancor non conosceva con la esperienza acquistata in ventiquattro anni di servizio nella carriera consolare egli mi fu largo durante la traversata di preziosi consigli.

Nei venti giorni di viaggio potemmo discorrere a lungo e metterci d'accordo punto per punto su tutto quello che io intendevo di fare per meglio corrispondere alla fiducia in me risposta da codesto On. Consiglio Centrale; nei due mesi poi ch'io passai in S. Paulo il Cav. Baroli mi seguì passo passo nelle mie indagini, ascoltando con vivo interesse le mie prime impressioni e i miei primi giudizi, riferendomi i suoi, discutendo di questi e di quelli e esaminando con molta cura le varie questioni che mi fu necessario di sottoporli.

Nel presentare pertanto questa relazione sento l'obbligo di pregare la S.V.Ill.ma perché voglia porgere al Console Cav. Baroli sentiti ringraziamenti per il valido aiuto ch'egli mi ha prestato nell'adempimento della missione affidatami. Senza il suo cordiale e prezioso consenso, io non avrei certo potuto esaurire le mie indagini così compiutamente ed in soli due mesi.

Anche giovò, a render per più facile il mio lavoro, l'incarico commessomi dal Ministero degli Affari Esteri, di visitare le scuole elementari italiane di S. Paulo.

Anzitutto mi fu perciò possibile conoscere *de visu* lo stato miserrimo di tali scuole, d'indagarne le cause e di studiare la questione dell'istruzione primaria nella nostra colonia, in relazione col progetto di istituzione di una Scuola media italiana, lo studio del quale era lo scopo effettivo del mio viaggio; in secondo luogo, essendosi annunziato il mio arrivo dai giornali di S. Paulo solo come inviato dal Ministero per l'ispezione alle scuole primarie, io potei con tranquillità e senza la minima noia attendere allo studio del progetto stesso.

Chè altrimenti, i quattro giornali italiani che ogni giorno si pubblicano nella città di S. Paulo, e che (eccezione fatta per l'Avanti!, organo del partito socialista, diffuso nella classe operaia) rappresentano non partiti politici ma piuttosto gruppi d'interessi non sempre d'accordo fra loro, i giornali, dico, troppo avrebbero parlato di questo progetto, suscitando soprattutto polemiche nella numerosa schiera degli insegnanti elementari italiani, i quali si sarebbero creduti in dovere di intervenire, di discutere tra di loro, di darmi suggerimenti e consigli, con la fede di poter aver parte nella eventuale attuazione; e le discussioni e le polemiche mi avrebbero forse creato non pochi ostacoli, e senza dubbio avrebbero recato danno al proposito vagheggiato da codesto On. Consiglio Centrale.

Pochi giorni dopo il mio arrivo, seppi infatti che in un'intervista pubblicata lo scorso anno in uno dei giornali italiani di S. Paulo, il Console Cav. Pio di Savoia non aveva fatto mistero della sua opinione favorevole all'istituzione di una scuola media; e seppi anche che alcuni maestri avevano tentato di approfittare di questa dichiarazione, col pericolo di

rovinare – è la parola – la bontà dell'idea⁶⁰. Cosicché, quando alcuni redattori dei vari giornali vollero chiedermi se io mi sarei occupato della questione della scuola media, mantenni il dovuto riserbo, pregandoli di parlare – se tale era proprio il loro desiderio – solo delle scuole elementari; e a tutti poi, sia ai giornalisti, sia ai membri del locale Comitato della «D.A.» come alle altre persone più autorevoli della colonia, colle quali dovetti naturalmente discorrere dalla scuola media per raccogliere quelle notizie e quei dati di fatto che mi erano indispensabili, a tutti feci osservare quanto fosse necessario tacere, almeno per ora.

Noi italiani – come tutti i latini in genere – abbiamo purtroppo il difetto di esporre ai quattro venti ciò che crediamo opportuno di fare, e molto spesso abbiamo poi la disgrazia di eseguire la decima parte di quello che avevamo annunciato e qualche volta, nulla affatto. Tutto ciò non giova alla fama della nostra energia e della nostra forza di volontà; e tutto ciò è specialmente molto grave allorquando accade all'estero, in una delle nostre colonie. «Facciamo prima e parliamo poi», così dissi a tutti quelli coi quali ebbi l'obbligo di intrattenermi sul progetto della scuola media; «avremo almeno il vantaggio, ove non riuscissimo a raggiungere il nostro il nostro scopo, di non fare una cattiva figura dinanzi all'elemento brasiliano, e soprattutto dinanzi agli altri stranieri che in S. Paulo hanno mirabili istituzioni scolastiche e che fanno più di quel che non parlino».

Le mie raccomandazioni ottennero l'effetto desiderato: nei giornali italiani si fece più volte parola della mia ispezione alle scuole elementari italiane⁶¹, ma mai il minimo cenno all'istituzione della scuola secondaria; questo nei due mesi della mia permanenza in S. Paulo e, se le mie informazioni sono esatte, anche dopo la mia partenza.

Non appena arrivato il Console Cav. Baroli mi presentò ufficialmente a S.E. il dr. Gustavo de Godoy, Ministro segretario di Stato per gli affari interni e per l'istruzione pubblica nello Stato di S. Paulo. L'On. Ministro, non che autorizzarmi a visitare le scuole e gli istituti brasiliani, ebbe la bontà di farmi accompagnare nella visita alle scuole primarie dal dr. João Lourenço Rodrigues, ispettore generale di dette scuole, e in quella alle scuole medie e superiori, dal dr. Carlos Rei, funzionario addetto al Gabinetto del Ministro stesso. Quanto alle scuole e ai Collegi stranieri non mi fu difficile visitarli, per gentile intervento di alcuni nostri connazionali.

Non sarà ora inutile far precedere il sommario della presente relazione.

Parte 1^a – Scuole primarie italiane e le scuole primarie brasiliane nella città e nello Stato di S. Paulo – proposte e rimedi. (pag. 7-50)

(N.B. Questa parte 1^a è la copia integrale del rapporto che ho in proposito presentato a S.E. il Ministro degli Affari Esteri: parmi necessario che la S.V. Ill.ma e codesto On. Consiglio Centrale ne abbiano sott'occhio il testo preciso).

Parte 2^a – Le scuole medie brasiliane (pag. 51-65)

Parte 3^a – I collegi e le scuole straniere nella città di S. Paulo (pag. 66-77)

Parte 4^a – L'istituzione di una scuola media italiana – suo ordinamento – la spesa necessaria (pag. 78-91)

Conclusione – (pag. 91-92)

Allegati

1° – Appendici varie alla relazione presentata a S. E. il Ministro degli Esteri, cioè alla parte 1^a.

2° – Programmi e regolamenti delle scuole primarie e medie brasiliane.

⁶⁰ Si veda più innanzi nella parte 1^a.

⁶¹ Vedasi l'allegato N° 4 bis [scritto a penna]

3° – Programmi, regolamenti ed altri documenti relativi alle scuole ed ai collegi stranieri.

4° – Verbali ordinanza limitato dalla «D. A.» di S. Paulo.

4° bis – Notizie dei giornali italiani di S. Paulo intorno alla mia visita alle varie scuole.

Parte 1a

Le scuole primarie italiane e le scuole primarie brasiliane nella città e nello stato di S. Paulo. Proposte e rimedi.

NB. Testo del rapporto presentato a S. E. il Ministro degli Affari Esteri.

Eccellenza,

Perché potessi eseguire con la maggior prudenza e con la necessaria riservatezza il compito assegnatomi – col consenso dell' E. V. e di S. E. il Ministro della P. I. – dal Consiglio Centrale della società «Dante Alighieri», circa l'istituzione di una scuola media in S. Paulo (Brasile) a vantaggio di quella nostra numerosa colonia, l' E. V. si compiacque affidarmi l'incarico di visitare le scuole elementari italiane di S. Paulo.

Ciò rese assai facile il mio colloquio, poiché fu appunto visitando quelle scuole ch'io ebbi modo di farmi un'idea chiara e precisa delle reali condizioni della colonia rispetto all'istruzione e alla cultura italiana, senza esser tuttavia costretto a far pubblicamente nota la parte ufficiosa della mia missione.

Reputo ora dover mio presentare all' E.V. la seguente relazione, nella quale ho in breve riassunto le mie impressioni e i miei giudizi sullo stato di dette scuole, impressioni e giudizi confermati – come l'E.V. potrà rilevare – dalle opinioni di alcune fra le persone più notevoli della colonia.

Nella sola città di S. Paulo esistono presentemente una settantina di scuole primarie italiane. Molte, troppe anzi; ma quante meritano il nome di scuola? quante sono in grado di rispondere alle più modeste esigenze della colonia?

È inutile illudersi: si tratta non di vere e proprie scuole, ma piuttosto di una settantina di persone esercenti, o meglio, che pretendono di esercitare la professione di insegnante, persone la maggior parte non chiamate, non idonee al magistero e che per il magistero non hanno talvolta la benché minima preparazione.

Cinquanta di questi maestri (chiamiamoli così, ma il nome è affatto improprio) hanno accettato la vigilanza del nostro R. Console Generale⁶², e ottengono pertanto per propri alunni i libri che codesto On. Ministero invia al Consolato o che il R. Console acquista in S. Paulo coi fondi messi a sua disposizione dal Ministero stesso. Dei cinquanta, cinque nell'anno scolastico 1904-05 e trentasei nel successivo 1905-06 hanno ottenuto anche un sussidio in denaro del Ministero, sempre per mezzo del Consolato.

Qualli (sic!) che non hanno voluto per varie ragioni accettare il patronato del R. Console, sono press'a poco una diecina (non è possibile precisare la cifra poiché di essi manca qualsiasi notizia negli uffici del Consolato), né è da credere che siano dei fieri ribelli all'autorità consolare; sono in generale gli eterni malcontenti, invidiosi, pettegoli e non di rado maligni (per giustizia debbo aggiungere subito che l'invidia e il pettegolezzo sono, più o meno, caratteristica di molti tra i professanti il magistero in S. Paulo, salvo poche eccezioni); eterni malcontenti che in ogni provvedimento, in ogni atto del R. Console, in ogni distribuzione di libri o di sussidi in denaro, vedono sempre protezioni, favoritismi e peggio; e amano quindi proclamarsi indipendenti dal rappresentante del R. Governo, rinunciando a qualsiasi sussidio.

Rimangono infine un'altra decina di maestri – e forse più – dei quali mi è stato pure impos-

⁶² Sono, salvo qualche inesattezza o qualche successivo aumento, i titolari delle scuole indicate a pp. 8-9 dell'Annuario delle Scuole italiane all'estero, pubblicato nel 1906 a cura di codesto Ministero.

sibile trovar notizia presso il Consolato; questi ultimi costituiscono quella che si potrebbe chiamare la squadra volante, poiché si tratta di persone che aprono scolette or qua or là, scolette che oltre all'instabilità dell'ubicazione, hanno quasi sempre una vita effimera, di pochi mesi, e – ciò che più importa – le persone stesse mutano ogni anno, cosicché la «squadra volante» ha ogni anno nuovi componenti, non meno disgraziati e infelici.

Ho visitato una per una le cinquanta scuole poste sotto la vigilanza del R. Console, e alcune delle cosiddette indipendenti, per desiderio espressomi personalmente dai rispettivi titolari; sarebbe ora una grave colpa nascondere o mitigare la verità, quale essa è in tutta la sua sconcertante crudezza. Così come sono oggi, le scuole italiane esistenti nella città di S. Paulo arrecano in generale piuttosto danno che vantaggio alla causa dell'educazione e dell'istruzione italiana in quella numerosa colonia; e anche i pochi buoni e mediocri insegnanti che formano l'eccezione, non possono, nelle condizioni in cui si trovano, svolgere un'opera proficua a malgrado della loro buona volontà.

Quali le cause?

Nel maggio del 1904 fu tenuto in S. Paulo il 1° Congresso delle Società e Istituti italiani nel Brasile, e tra i temi più vivacemente discussi vi fu quello dell'«educazione e istruzione e dei mezzi e provvedimenti per diffondere la cultura e la lingua italiana nel Brasile, e per fondere e mantenere scuole e istituti italiani d'istruzione».

Ho letto naturalmente con molta attenzione il resoconto della discussione⁶³, nella quale si proclamò, da alcuni maestri, ben s' intende – che solo agli insegnanti e ai loro sacrifici spetta il merito della diffusione della lingua italiana in S. Paulo; si accusò il Governo patrio e la colonia di indifferenza: si discorse dell'insegnamento laico e di quello religioso, si fece insomma molta retorica, come a ragione osservò un congressista⁶⁴, ma non si ebbe il coraggio di confessare apertamente quelle verità che a non pochi, soprattutto fra gli estranei alla classe degli insegnanti, erano e sono ben note.

Che nella scuola di S. Paulo la lingua italiana sia sempre molto diffusa è fuor d'ogni dubbio; ma più che all'opera degl'insegnanti ciò si deve al fatto che la Colonia è di formazione recentissima; essa che nel suo complesso non conta più di 25-30 anni di vita e che è tanto numerosa, non può che conservare vivissimo l'amore – uno scettico direbbe l'abitudine – per la patria lingua, e sarebbe strano del resto, che fosse altrimenti.

Che il governo italiano debba preoccuparsi delle scuole di S. Paulo è certo innegabile; ma è pur certo che il Governo non farebbe opera efficace sussidiando, come è stato fatto in questi ultimi anni – o anche in più larga misura – tutti coloro che esercitano oggi la professione di insegnante. Aiutare tali maestri significherebbe forse fare opera pietosa, di beneficenza; ma le scuole non migliorerebbero affatto, né la causa dell'italianità nella città di S. Paulo progredirebbe d'un passo.

Che a sua volta infine la colonia debba cooperare alla istituzione e alla prosperità di buone scuole italiane è cosa indiscutibile; ma buone scuole, cosicché quelle che presentemente esistono dovrebbe in maggioranza scomparire.

Sembra a me evidente che le cause della miserevole condizione in cui si trovano le scuole italiane nella città di S. Paulo, siano invece:

1° – la nessuna preparazione al magistero, alla quale ho già accennato, della maggior parte di quegli insegnanti.

Dei settanta esercenti il magistero, solo una dozzina all'incirca possiede un regolare diploma di abilitazione all'insegnamento, ma – si noti bene – per alcuni si tratta solamente di

⁶³ *Atti del 1° Congresso*, ecc. resoconto pubblicato a cura del Comitato ordinatore; pp. 99-109 – S. Paulo, tip. G. Galilei, 1904.

⁶⁴ *Atti citati*, p. 105.

quel diploma o patente di grado inferiore quale le nostre scuole normali usavano rilasciare un tempo, e abolito con legge del luglio 1896.

E qui mi preme di non essere frainteso.

Io non nego che possa talvolta insegnare con qualche profitto – specialmente in una scuola media, a giovanetti già un po' maturi – chi, pur essendo sprovvisto di qualsiasi diploma, abbia, oltre a una mediocre intelligenza e cultura, quella vera e naturale disposizione all'insegnamento che si usa dire la vocazione; e nemmeno affermo che il diploma di abilitazione all'insegnamento sia sempre in tutti i casi sufficiente garanzia di idoneità. Come tra gli insegnanti privi di un titolo regolare di abilitazione, non manca in S. Paulo chi, posto in altre condizioni, potrebbe forse dare alla scuola opera non inutile, così, fra quelli provveduti di un diploma v'ha pure qualcuno che è e rimarrà sempre insufficiente e inadatto, a malgrado del proprio stesso diploma.

Ma come mettere in dubbio che si possa in generale insegnare in una scuola primaria senza aver seguito un corso regolare di studi negli istituti magistrali, senza aver la conoscenza di ciò che si chiama un metodo, senza esser in grado di adottare qualsiasi metodo? Purtroppo molti di coloro che nella città di S. Paulo hanno aperta una scuola, non hanno solo il torto di esser privi del diploma di licenza normale, ma non posseggono neppure quella mezza coltura che non è difficile trovare nella disgraziata famiglia degli sposati; e alcuni perfino non hanno la esatta e sicura conoscenza di quei primi elementi che debbono essere impartiti agli alunni di una scuola primaria⁶⁵. Tuttavia, i meno preparati, i meno idonei al magistero, quasi in ragione diretta della propria ignoranza, sono precisamente quelli che si dicono pronti a insegnare un po' di tutto, e si improvvisano senza il minimo scrupolo professori di disegno, di lingua francese, di lingua latina e di altre lingue vive e morte.

Così bastò che il Cav. Pio di Savoia, allora Console in S. Paulo, in un'intervista pubblicata lo scorso anno nel giornale quotidiano di quella città «La Tribuna Italiana», affermasse – forse con non troppa opportunità⁶⁶ – essere indispensabile l'istituzione di un ginnasio italiano nella colonia, perché subito tre o quattro maestri annunziassero al principio del corrente anno il proposito di aprire il ginnasio stesso, dichiarandosi disposti a dividersi il carico dell'insegnamento di tutte le varie discipline del corso ginnasiale.

Fortunatamente la colonia non si commosse e la cosa non ebbe seguito; ma nel corpo insegnante brasiliano che, come vedremo, esercita con dignità e decoro l'ufficio suo e tra i professori autentici dei colleghi stranieri esistenti in S. Paulo, non mancò purtroppo chi rise dell'audacia incosciente di quei maestri.

2°. Le scuole italiane, così deficienti per qualità, sono troppe per numero. Nei primi anni,

⁶⁵ Si vedano nell'appendice n° 3 alla presente relazione alcuni saggi della istruzione della cultura di parecchi di questi insegnanti.

⁶⁶ Anzitutto non mi pare sia mai prudente render pubblicamente note all'estero, sia pure in un giornale coloniale, proposte o progetti di istituzioni che dovrebbero mirare a mantener vivo e a diffondere il culto dell'italianità, e ciò tanto più ove si tratti di progetti di non facile esecuzione, che, mentre possono correre il rischio di non divenir così presto – o mai – fatti compiuti, per essere annunziati in un giornale della colonia e per bocca del rappresentante del R° Governo, suscitano naturale e intempestiva differenza nell'autorità locale e nella popolazione indigena. D'altra parte in una colonia qual è quella di S. Paulo, dove si pubblicano quattro giornali quotidiani italiani – l'uno naturalmente poco amico o avverso all'altro – troppo spesso le migliori idee e le proposte più buone minacciano di naufragare in un mare di discussioni e di polemiche. Infine, il tentativo medesimo di quei tre o quattro maestri, poteva recare non poco danno alla serietà del progetto esposto dal Cav. Pio di Savoia, cosicché il silenzio dei giornali anche in quest'occasione sarebbe stato preferibile.

e precisamente dal 1887 al 1893, quando poche erano anche le scuole brasiliane, gli insegnanti italiani erano pochi e – dati i bisogni della colonia in quel tempo – relativamente mediocri; inoltre ognuno d'essi poteva ritrarre dal suo lavoro quel tanto necessario per vivere, se non con una certa larghezza, almeno senza eccessive preoccupazioni.

Dal 1893 in avanti il numero degli insegnanti andò ogni anno di mano in mano aumentando, sia perché la colonia diventò sempre più numerosa, sia perché alcuni, attratti dai modesti ma sicuri guadagni fatti dai primi e pochi maestri, sperarono in una buona fede di poter far altrettanto, sia anche perché non pochi, arrivati in S. Paulo in cerca di migliore fortuna, non seppero far di meglio che aprire una scuola. Questi ultimi – e sono purtroppo la maggioranza – appartengono a quella disgraziata categoria di sposati, che non sanno esercitare alcun mestiere, che non hanno, come dissi più sopra, neppure una mezza cultura e che appena sanno leggere, scrivere e far di conto; spostati che nell'insegnamento sono più che mai fuori di posto e che a questo tuttavia si sono dedicati perché null'altro sanno fare, o perché a un vero lavoro – anche al più facile e non richiedente lunga preparazione – essi non hanno talvolta alcuna volontà di dedicarsi.

Nelle presenti condizioni della colonia, qualche alunno si può sempre trovare; d'altra parte, chi non sa che insegnare male, senza alcun serio indirizzo e senza timore alcuno di ispezioni, insegnare qualche cosuccia col solo scopo di finir presto la giornata, deve essere fatica ben lieve?

Ad accrescere il numero di maestri, contribuì di recente la notizia più volte apparsa nei giornali della colonia, rispetto all'intenzione di codesto On. Ministero per l'erogazione dei 150 contos di reis (L. 265000 circa, derivanti dalle indennità pagate anni sono al nostro Governo da quello brasiliano), a beneficio dell'istruzione elementare nelle colonie italiane del Brasile; e non meno contribuì il fatto dei sussidi largiti in questi ultimi anni dal Ministero stesso, per mezzo del R. Console. Si pensi infatti che dalle cinquanta scuole poste sotto la vigilanza del Consolato, sette furono istituite nel periodo suaccennato, dal 1887 al 1893; ventuno sorsero dal 1893 al 1899; ventidue dal 1900 al 1906!

A poco a poco si iniziò così tra scuola e scuola una concorrenza accanita, e talora una lotta non onesta, per contendersi gli alunni, lotta e concorrenza giunte oggi allo stadio acuto, per le quali tutti gli esercenti la professione di maestro conducono in generale una vita assai stentata, e per cui anche i pochi e buoni non hanno quella tranquillità d'animo necessaria per dare alla scuola opera utile.

Mentre nei primi tempi ogni insegnante riceveva da ciascun alunno una retta mensile che arrivava in pochi casi fino a 10.000 reis (L. 15,70), e che mai era inferiore a 5000 reis (L. 7,85), oggi, pur essendo migliori le condizioni della colonia nella città di S. Paulo (si badi che dico città e che qui intendo parlare soprattutto della classe operaia), oggi la retta che i maestri li ricevono varia da un maximum di 6000 o 7000 reis (= rispettivamente a L. 9,50 e 10,50 circa) raggiunto in ben poche scuole, a un minimum di 3000 e perfino 2000 reis (= L. 5 e L. 3 circa)!

Alcuni insegnanti poi, come mezzo di concorrenza hanno aumentato l'orario di scuola; altri hanno ampliato il programma di insegnamento, sì da comprendervi materie che non fanno parte del corso elementare e che del resto non sanno insegnare. Tutti, ripeto, conducono una vita poco lieta; tutti più o meno sono in lotta con questo o con quel collega; e i pettegolezzi, le piccole invidie, le innocue o cattive malignità trovano di tratto in tratto il loro sfogo in articoli e comunicati inseriti in questo o quel giornale italiano⁶⁷.

⁶⁷ Dissi già che nella città di S. Paulo si pubblicano quotidianamente quattro giornali italiani, e cioè: Il «Fanfulla», dal 1892; la «Tribuna italiana» dal 1893; l'«Avanti!» dal 1899; il «Secolo» dal 1906. Si aggiunga che altri quattro o cinque giornaletti italiani vedono la luce ogni domenica (il «Gazzettino» il «Cara-dura» (Facciatosta), il «Tre di picche», la «Luce», il «cinema-

Vero è che in questi ultimi mesi, visto che le polemiche erano ormai divenute troppo frequenti e avevano assunto un carattere troppo grave per la crudezza con la quale alcuni maestri si calunniavano reciprocamente – polemiche in cui spesso gli avversari davano triste spettacolo della loro mancanza di educazione e offrivano inoppugnabile documento della loro scarsa istruzione, tanto i loro scritti erano volgari nella sostanza e nella forma offensivi per la grammatica – vero è, dico, che anche i giornali non si prestano ora così facilmente a pubblicare scritti polemici di insegnanti; e mentre qualche giornale si rifiuta senz'altro di ospitare nelle proprie colonne tali scritti, qualche altro dà posto ai soli comunicati a pagamento.

L'una e l'altra misura, e specialmente la prima, sono state provvidenziali; poiché, se pochi erano e sono gli insegnanti che amavano render pubbliche le loro misere guerricciolate, e che in ciò continuerebbero se loro fosse possibile, non è dubbio che grave danno è derivato a tutta la classe per la pochissima stima che la colonia ha in generale per tutti i maestri, salvo poche eccezioni. Tuttavia la forma di concorrenza irosa tra scuola e scuola non è affatto cessata, e spesso io ho dovuto con bel garbo ma in modo reciso far comprendere a più d'un maestro che il mio compito era di visitare le singole scuole, non di ascoltare pettegolezzi o querimonie contro questo o quell'insegnante, e tanto meno contro l'autorità consolare.

3°-Deficenti per qualità, troppe di numero, le scuole italiane hanno anche il difetto di essere ordinate in moto, dirò così, primitivo.

Da principio, quando erano pochi, gli insegnanti si accontentavano di svolgere il programma del corso elementare inferiore. In una sola aula erano riunite le tre classi del corso (1^a, 2^a, 3^a classe, o come si usava dire allora, 1^a inferiore, 1^a superiore e 2^a), così come nelle nostre scuole rurali; e le cose procedevano alla meno peggio, tanto più che minori erano i bisogni della colonia. In seguito, determinatasi con l'apertura di nuove scuole quella spietata concorrenza a cui ho testé accennato, tutti gli insegnanti sentirono il bisogno di aggiungere alle prime tre classi il corso superiore (4^a e 5^a classe), e l'ordinamento di ciascuna scuola peggiorò in modo sensibile, cosicché io non esito ad affermare che – indipendentemente dal valore dei maestri – le scuole italiane di S. Paulo sono rispetto all'ordinamento di gran lunga inferiore a qualsiasi nostra scuola rurale.

Dico in generale: e infatti delle cinquanta e più scuole da me visitate, una sola trovai logicamente ordinata, una in cui l'insegnamento è tuttora ristretto al corso inferiore e in cui le tre classi del corso hanno ciascuna la propria aula e la propria maestra⁶⁸. Delle altre, sei soltanto hanno pure tre aule ciascuna, ma hanno però il corso elementare completo, inferiore e superiore; ognuna di queste sei scuole ha cioè un'aula per la 1^a classe, una seconda aula per la 2^a e 3^a classe, una terza aula per la 3^a, 4^a, 5^a classe e perfino per quella 6^a classe introdotta con la legge Orlando (1904), e che soltanto con l'anno scolastico 1907-08 i comuni aventi più di 4000 abitanti hanno l'obbligo di istituire in Italia. Quindici scuole hanno appena due aule ciascuna, eppure in quasi tutte e quindici si afferma che si svolge l'intero programma del corso elementare, di guisa che gli alunni risultano distribuiti in un'aula per le tre prime classi, in una seconda per la 4^a e 5^a classe! Infine ben trenta scuole (parlo sempre delle cinquanta e più da me visitate) hanno una sola aula, e ciò nonostante in quasi tutte e trenta si ha il coraggio di assicurare che si svolge l'intero programma del

tografo» ecc. giornaletti più o meno umoristici) alcuni dei quali vivono, è vero, di una vita breve, ma trovano anche subito un successore; si aggiunga infine che nei centri minori dell'interno dello Stato di S. Paulo, altri giornaletti italiani si pubblicano settimanalmente, quali quelli di Campinas, S. Carlos do Pinhal, Riberão Preto ecc. Se e quanto possano giovare alla prosperità della colonia tutti questi giornali, certo io non saprei dire.

⁶⁸ È la scuola "Regina Margherita" delle sorelle Magrini.

corso elementare! Trenta scuole dove di una piccola aula sono riuniti bambini e bambine che dovrebbero frequentare chi la 1^a, chi la 2^a, chi la 3^a, chi la 4^a e chi la 5^a classe!

Ma non basta. Ho detto che sei scuole hanno tre aule ciascuna e che quindici ne hanno due: in ognuna di dette scuole l'insegnante proprietario ha perciò o due o un aiutante. Ora questi aiutanti sono quasi sempre rappresentati dalla moglie o dalla figlia dell'insegnante stesso, e queste, fatte pochissime eccezioni, non solo non hanno alcuna preparazione all'insegnamento, ma sono del tutto inadatte all'ufficio

4° – Ma a rendere così poco utili le nostre scuole italiane non occorre soltanto la illogica e anti – didattica distribuzione degli alunni in tre, due o un'aula. Se si vedesse soprattutto quali aule!

Premetto che aule vere e proprie – o almeno discrete – non si trovano che in otto o dieci delle scuole da me visitate: tutte le altre non hanno che una, due o tre piccole camere a cui non si può dare il nome di aula. In generale l'insegnante, quasi sempre carico di moglie e di figliuoli, prende in affitto una casetta dove non vi sono mai più di quattro o cinque camere ⁶⁹ e un minuscolo cortile: esso adibisce ad uso della scuola una, due o massimo tre di queste camerette, dove spesso difettano l'aria e la luce, e il resto riserba per sé e la famiglia.

Non aule dunque, ma nella maggior parte dei casi, piccole camere immediatamente contigue a quelle destinate all'abitazione dell'insegnante; ecco il luogo dove sono accolti gli alunni in buon numero, ecco il luogo che reca pomposamente al di fuori la scritta di «Scuola italiana»!

Confesso che io mi sono sentito stringere più volte il cuore, che ho provato più volte ho un senso di vergogna e di umiliazione visitando molte di queste scuole, che anche si fregiano quasi sempre di nomi sacri alla memoria di noi italiani e che hanno posto in siffatti i locali!

Visitavo in quegli stessi giorni le scuole primarie brasiliane, quasi tutte ospitate in imponenti edifici appositamente costruiti, edifici quali nel nostro stesso paese non è molto facile trovare neppure nelle principali città; visitavo in quei giorni colleghi e le altre scuole private straniere che hanno edifici propri non meno imponenti (eppure tutti gli stranieri residenti nella città di S. Paulo, riuniti assieme, non costituiscono la quinta parte della nostra colonia); e come rimanere indifferenti, come non sentirsi avviliti entrando in una delle cosiddette scuole italiane?

Ma non soltanto la ristrettezza dei locali rende così infelici le nostre scuole. Ho osservato in parecchie la mancanza quasi assoluta di pulizia; ho trovato in più di una, l'insegnante trascuratissimo (adopero una parola benevola) sia nell'abito sia nella pulizia personale.

Possono insegnanti e scuole di tal natura trovar favore nella colonia? O non è chiaro anziché alla colonia nostra deriva da esse più danno che vantaggio?

Deficienti rispetto al valore dell'insegnante troppe di numero, ordinate in modo primitivo e situate in locali affatto inadatti: tali sono le scuole italiane della città di S. Paulo ⁷⁰.

Le spese di affitto sono assai gravi; anche con un discreto numero di alunni si lavora solo per pagare la pigione»; così mi dissero a una voce tutti i maestri; e se si tiene conto della concorrenza dei molti, contro la quale ognuno è costretto a lottare, il numero sempre crescente di nuove scuole che ogni anno – sarei per dire ogni mese – si aprono e dei non pochi maestri che, pur di avere qualche alunno si accontentano di ricevere dalle famiglie

⁶⁹ Nella città di S. Paulo sono moltissime le casette che hanno il solo pianterreno, o che tutt'al più si innalzano fino ad un 1° piano, sopra il pianterreno; cosicché le une le altre servono ciascuna per una famiglia.

⁷⁰ Si vedano nell'appendice n° 5 le opinioni di alcuni fra i membri più autorevoli della colonia.

una retta mensile sempre più scarsa, si comprende facilmente come perché anche pochissimi insegnanti buoni e mediocri non possono avere una scuola discreta, per ciò che si riferisce ai locali⁷¹.

È innegabile tuttavia che le scuole italiane, pur trovandosi in simili condizioni e non godono – ripeto – la fiducia della maggioranza della nostra colonia, sono abbastanza frequentate. Le cinquanta scuole iscritte presso il Consolato hanno un totale di circa 3200 alunni con una media dunque di 64 ciascuna⁷²; cosicché calcolando che le altre 20 scuole indipendenti dal rappresentante del R. Governo abbiano una media di 40 allievi ciascuna, si può affermare che la popolazione totale delle 70 scuole italiane somma 4000 alunni circa⁷³.

Una tale frequenza però dipende semplicemente dal fatto che le scuole primarie brasiliane non sono ancora in numero sufficiente per ospitare tutti questi alunni.

La colonia di S. Paulo – mi preme dirlo chiaramente – conserva vivissimo l'amore per la madrepatria, per tutto ciò che è italiano, e del suo patriottismo essa ha detto in molte occasioni, anche di recente prove luminose. Io sono quindi certissimo che, se le scuole brasiliane fossero anco migliori di quello che sono e sufficienti per numero al bisogno, e buone o almeno mediocri fossero alla lor volta le scuole italiane, sono certissimo che la colonia per amor di patria non esiterebbe a preferire queste a quelle. Ma se oggi buona parte della colonia manda i propri figli alle scuole italiane, fa ciò perché vi è costretta, poché essendo le scuole brasiliane, ché altrimenti lascerebbe senz'altro da parte le prime – e ben a ragione! – come del resto già fanno non pochi italiani.

Ho avuto modo di visitare parecchie scuole primarie brasiliane, e poiché mi fu dato anche di prendere diretta conoscenza dell'ordinamento dell'istruzione elementare nello stato di S. Paulo, credo non inutile riferire in breve all' E.V. non dirò le mie impressioni, ma piuttosto ciò che ho veduto, perché riesca a evidente quanto grave e penoso sia il confronto con le cosiddette scuole italiane⁷⁴.

⁷¹ Il Console Cav. Pio di Savoia, nella sua importante relazione sullo stato di S. Paulo, scritta nel giugno del 1904 e pubblicata nel n° 3 del Bollettino dell'Emigrazione (1905), afferma (pag. 62) che un operaio il quale sappia vivere da pari suo – si accontenti cioè dello strettissimo necessario – deve, per una cameretta e relativa cucina, pagare nella città di S. Paulo 30.000 reis in media d'affitto mensile, ossia, al cambio attuale, circa L. 47. In questi ultimi tre anni gli affitti sono ancor più e di non poco, aumentati: avviene nella città di S. Paulo quello che accade in molte città europee travagliate dalla cosiddetta «carestia delle abitazioni» e dove il trovar casa diventa un problema sempre più grave; gli affitti continuano a salire. Si pensi, del resto che oggi gli stabili rendono in media dal 15 al 16%. Aggiungo poi che il prezzo di 30.000 reis (L. 47) al mese, per una camera e cucina, deve in ogni modo essere considerato come minimo e solo in quei due o tre rioni o quartieri di S. Paulo abitati da operai: negli altri quartieri della città, i prezzi sono ben più alti, anche per abitazioni modestissime.

⁷² Trenta di queste cinquanta scuole hanno anche un corso serale per analfabeti adulti, con un totale di 550 iscritti; e qui giova notare che l'opera degl'insegnanti, anche di quelli poco idonei o mal preparati al magistero, riesce in questi corsi serali un po' più proficua. Ciò non deve sorprendere, perché niuno ignora che è meno difficile insegnare a giovani di intelligenza già matura e i quali ardentemente desiderano di imparare, che non ai fanciulli. È fuor d'ogni dubbio, del resto, che tali corsi sarebbero assai più frequentati e con ben altro profitto ove maggiore fosse il valore delle insegnanti.

⁷³ Queste cifre non sono esattissime, perché non mi è stato possibile conoscere con precisione il numero degli iscritti nelle venti scuole che io non ho visitate; ma è certo che se vi è errore, esso è nel senso che gli alunni siano più di 4000 e non mai meno.

⁷⁴ presentato dal Console Nobile Cav. Pietro Baroli a S. E. il Dr. Gustavo de Godoy ministro degli affari interni e dell'istruzione dello Stato di S. Paulo, io ottenni di poter visitare tutte le

«È lusinghiero il fatto che si osserva nel nostro stato, sì di esser cioè richiesti insistentemente, quasi disputati i posti nelle scuole...». Così il Dr. Jorge Tibiricà. Presidente dello Stato di S. Paulo, nel suo recente messaggio al Congresso legislativo (Senato e Camera dei deputati), letto il 14 luglio u.s.; e in verità lo stato ha il diritto di compiacersi di quanto ha fatto in questi ultimi vent'anni in materia d'istruzione primaria.

Si può anzi affermare che per l'ordinamento delle sue scuole esso è oggi alla testa dei venti Stati componenti la federazione brasiliana, né abbia molto da invidiare alle nazioni più progredite. Il merito di tale ordinamento spetta al dr. Prudente de Moraes, al dr. Antonio Gaetano da Campos, al dr. Cesario Motta, brasiliani, e a una colta e intelligente donna, a Miss Marcia P. Browne, del nord-America.

Miss Browne tra il 1880 e il 1890 si trovava a capo della Scuola Americana fondata nel 1870 in S. Paulo dal Rev. G. W. Chamberlain per incarico delle Missioni Presbiteriane [The P. Presbyterian mission] Degli Stati Uniti del nord, scuola ove si impartiva e si impartisce tutt'ora l'insegnamento del corso elementare e del corso medio inferiore (corrispondente, quest'ultimo, pressappoco alla nostra Scuola Tecnica e al nostro Ginnasio inferiore), e frequentata anche oggi da numerosi alunni, interni ed esterni, che pagano una retta non indifferente⁷⁵.

La scuola americana fu modellata esattamente sul tipo delle scuole primarie delle scuole medie inferiori degli S.U. del nord, poiché com'è naturale, il proposito della Missione presbiteriana non era soltanto quello di diffondere l'educazione cristiana, ma anche di introdurre in Brasile il sistema d'istruzione adottato nella America settentrionale.

Cosicché, quando nel 1890 lo Stato di S. Paulo, volendo porre mano ad una migliore completa organizzazione delle sue Scuole elementari, pregò Miss Browne di cooperare a tale impresa, la direttrice della Scuola americana accettò con entusiasmo l'incarico, e colla sua opera vigorosa fece prevalere i metodi di educazione e d'istruzione preferiti nelle scuole primarie del nord – America.

Le scuole di tutto lo stato furono pertanto ricordate nel modello della «American School» (the Preliminary course), e il governo senza lesinare, dirò meglio, spendendo ogni anno milioni e milioni, tutto quello insomma che reputavo necessario per attuare il programma che il Congresso aveva approvato, continuo di mano in mano ad aumentare il numero delle scuole primarie, seguendo rigorosamente i criteri adottati da Miss Browne nella prima scuola che essa istituì per conto del Governo stesso, l'*Escola – Modelo do Carmo*. L'aumento delle scuole continua tuttora poiché il loro numero non è ancora sufficiente,

scuole d'istruzione primaria, media e superiore. S.E. con squisita gentilezza mi fece accompagnare nelle visite alle scuole elementari dal Dr. João Lourenço Rodrigues, Ispettore generale per l'insegnamento primario.

⁷⁵ Nel 1890 la Missione presbiteriana fondò in S. Paulo il «Mackenzie College» e a questi venne annessa la Scuola americana, pur rimanendo essa in edificio e località separati. Nel «Mackenzie Collage» s'impartisce l'insegnamento medio di secondo grado, che corrisponde cioè al nostro Ginnasio Superiore e al nostro Liceo, più v'è il corso completo per gli studi d'ingegneria. Il Collegio dipende direttamente dalla Direzione generale delle Missioni, che risiede in New York; per la sua facoltà di ingegneria è poi aggregato ufficialmente alla Università the New York che manda ogni anno i diplomi di laurea, con effetti legali, per gli allievi che hanno compiuto il corso. Esso può dunque considerarsi come una vera e propria succursale di quella potente Università. Il Collegio porta il nome di uno dei suoi più cospicui benefattori, del Sig. John T. Mackenzie di New York, che dono 50 mila dollari: occupa una immensa estensione di terreno in uno dei migliori quartieri di S. Paulo, terreno di sua proprietà, con 4 o 5 edifici appositamente costruiti.

ma fra pochi anni il Governo potrà con sicura coscienza affermare d'aver svolto tutto il suo programma.

Varie furono le disposizioni legislative e presidenziali dal 1890 in avanti, per ciò che si riferisce all'istruzione primaria: che si riferisce all'istruzione primaria le più recenti sono quelle contenute nella legge 13 agosto 1904 N. 930 e nel decreto 1239 del 30 settembre successivo.

L'istruzione elementare [*ensino preliminar*] è gratuita, amministrata direttamente dallo Stato, e l'intera spesa grava sul bilancio governativo: l'istruzione è obbligatoria per tutti i fanciulli d' ambo i sessi, dai sette ai dodici¹² anni.

In ogni sede di Municipio, ove si possa tra maschi e femmine accertare l'esistenza di 400 alunni almeno, il Governo ha la facoltà di istituire una scuola elementare completa, cioè coll'intero corso che dura quattro anni, e quindi con otto classi (quattro per i maschi e quattro per le femmine) con otto tra maestri e maestre (le maestre insegnano nelle classi femminili e possono insegnare anche nella prima classe maschile), e con un direttore: la scuola così completa è detta: *Grupo escolar*, e può avere naturalmente più di otto classi, cioè avere delle classi bis o classi aggiunte, e anche queste con appositi insegnanti, quando gli alunni superino il numero di quattrocento.

Il Governo si riserva di creare dei *Grupos Escolares* di preferenza di quelle sedi di Municipio, ove le municipalità offrano terreno e locali; ha anche la facoltà di istituire dei *grupos* con soli 200 alunni, purché siano del medesimo sesso, e in tal caso la Scuola ha solo quattro classi e quattro insegnanti.

I maestri sono assunti in servizio in seguito a regolare concorso, bandito fra coloro che abbiano fatto i loro studi e conseguito il diploma nella Scuola Normale dello Stato⁷⁶, e il loro stipendio è di tre contos e mezzo di reis, cioè L. 5700 all'anno (L. 480 circa il mese): il direttore del *grupo* riceve invece quattro contos di reis, cioè L. 6300 all'anno (L. 525 circa il mese).

I *grupos escolares*, sia nella capitale sia nell'interno dello Stato, hanno tutti un edificio proprio appositamente costruito: in generale l'edificio ha l'aspetto di un grande palazzo, non privo di una certa eleganza nella semplicità delle idee architettoniche; esso si compone di due parti o ali, una riservata alla sezione maschile, l'altra alla femminile; nella parte centrale stanno gli uffici della Direzione, della segreteria, con anticamere o sale di aspetto e un salone per saggi di ginnastica, musica ecc.; v'è poi un gran cortile – giardino, diviso in due parti (l'una pei maschi l'altra per femmine), con tettoie laterali per permettere agli alunni di restare all'aperto durante il maltempo.

Ho visitato quattro *Grupos Escolares* nella città di S. Paulo: il gruppo escolar do Carno (la Scuola modello istituita da Miss Browne), il gruppo Prudente de Morães, il *grupo do Braz* e quello di S. João: altri ne ho veduti nell'interno dello Stato come quelli di Campi-

⁷⁶ Fino a poco tempo fa, essendo insufficiente al bisogno il numero dei licenziati dalla scuola normale (ve n'è una sola che ha sede nella capitale) prendevano parte a i concorsi anche i licenziati delle scuole complementari o dal ginnasio, dopo aver fatto un anno di tirocinio nelle scuole elementari dello Stato (legge n. 374, del 3 settembre 1895). L'insegnamento delle scuole complementari (ve ne sono cinque una nella capitale preparatoria alla scuola normale, e quattro nell'interno dello Stato) dura quattro anni, e corrisponde in parte a quello che si impartisce nelle nostre scuole tecniche, in parte a quello delle nostre scuole complementari o preparatore alle scuole normali; il corso ginnasiale dura sei anni ed è necessario a coloro che vogliono proseguire gli studi nelle Università e Istituti superiori. Nel messaggio testè ricordato, il Presidente dello Stato ha proposta che sia senz'altro abolita la concessione fatta ai licenziati dalle scuole complementari e dal ginnasio, colla legge suaccennata essendo ormai da qualche anno, e di non poco cresciuto il numero di licenziati della scuola normale.

nas, di Espirito Santo de Pinhal, o sul litorale, come quello di Santos, ecc. Ripeto che è difficile trovare nelle nostre principali città edifici destinati alle scuole elementari così imponenti per costruzione, tali da rispondere alle più moderne esigenze, e così ben tenuti rispetto alla pulizia.

Le aule sono grandi, piene di luce, di aria, capaci di contenere ben più dei 45 alunni prescritti come massimo: alle pareti è fissata tutt'all'intorno la lavagna o tavola nera, a guisa di grande fascia, alta un metro, ciò che permette all'insegnante di scrivere o tracciare modelli sulla lavagna in qualunque punto dell'aula egli voglia o creda più opportuno, e di essere perciò vicino ora a questi ora a quegli alunni.

I banchi sono fabbricati secondo i due o tre tipi più diffusi nel nord – America; sono a forma di piccolo scrittoio con seggiola di cui si può regolare l'altezza, uno per alunno, o al più riuniti in coppia; la costruzione è accurata, direi quasi elegante.

Chi entra in una di queste scuole non può non rimanere gradevolmente sorpreso dalla disciplina ammirabile degli alunni, sia durante le lezioni sia nel periodo della ricreazione, e soprattutto dalla pulizia, che è mantenuta dovunque, nelle aule e nei corridoi lungo le scale, in modo scrupoloso. I banchi anche dopo due o tre anni di uso sembrano come nuovi, tanto i fanciulli sono abituati fin dal primo giorno a rispetto di tutto ciò che è proprietà dello Stato; e sulle pareti bianchissime nessuno pensa a dar saggio di attitudini artistiche o a fissare il documento della propria mancanza di educazione⁷⁷.

Ho passato un'intera giornata in ciascuna delle scuole che ho visitate e in qualcuna sono ritornato il giorno successivo rimanendo fino alla sera; ho assistito a varie lezioni in ciascuna delle quattro classi costituenti il corso elementare, a saggi di ginnastica, ai giochi durante il periodo della ricreazione, ecc.: io non voglio esprimere alcun giudizio particolare sul sistema didattico adottato nelle scuole brasiliane, di S. Paulo, mi accontento solo di osservare che il sistema deve in complesso esser buono, visto che dà buoni risultati. Le materie d'insegnamento più o meno sono quelle che si trovano nei programmi delle scuole elementari di ogni paese civile; tuttavia parmi che il metodo d'insegnamento abbia il vantaggio di essere più pratico del nostro e quindi più semplice. Ciò che è regola o definizione, è si può dire del tutto bandito: la guerra alla teorica è senza quartiere. Si dà molta importanza all'insegnamento della musica; in ogni scuola c'è sempre un pianoforte e le classi, o separatamente o tutte riunite, hanno frequenti lezioni di canto impartite da apposito maestro, e imparano inni nazionali, ed altro con intento educativo.

I maestri sono colti, e forse più dei nostri in Italia, poiché il programma della scuola normale è, rispetto alla cultura generale, assai più ampio dei programmi vigenti delle nostre scuole magistrali⁷⁸; si aggiunga che l'intero corso normale occupa otto anni (quattro per il corso complementare o preparatorio, e altrettanti per il corso normale) mentre nella nostra scuola normale dura sei anni soltanto. Tuttavia, anche a un osservatore superficiale, non può sfuggire che i maestri appaiono un po' troppo evidentemente modellati tutti sul medesimo tipo; e ciò ha la sua ragione nel fatto che la scuola normale è unica in tutto lo Stato. Anche potrà sembrare eccessivo il sistema a cui ogni insegnante s'attiene scrupolosamente di dare ordini agli alunni medianti (sic!) un campanello a timbro; per

⁷⁷ Quale differenza purtroppo con le scuole elementare (sic!) italiane e non con queste sole in Italia un banco nuovo difficilmente giunge intatto alla fine del primo anno scolastico; un muro bianco si conserva tale in una scuola ben pochi giorni. In generale i nostri alunni – anche quelli delle scuole medie superiori – non hanno molto rispetto di quanto è proprietà collettiva, ed è innegabile che ciò non è confortante, poiché è prova manifesta che (sic!) la scarsa educazione impartita nelle scuole nostre.

⁷⁸ Gli alunni studiano la lingua francese e l'inglese e i primi elementi della lingua e letteratura latina.

il cambiamento della lesione (il passaggio dalla lettura, per esempio, all'aritmetica) il maestro non si vale affatto della voce; preme il campanello quel numero determinato di volte e gli alunni eseguono senz'altro. Queste ed altre minuzie potranno prestarsi forse ad una facile critica, ma si tratta di minuzie: ciò che è fuor di ogni dubbio, è che l'insegnante sa il fatto suo, che è pagato in modo sufficiente e che tiene con dignità e con decoro l'ufficio suo.

Presentemente lo stato di S. Paulo, (che ha circa due milioni e mezzo di abitanti) può contare N. 76 *grupos escolares*, dei quali sedici della capitale, 54 nell'interno e 6 sul litorale, con 2616 alunni; e poiché essi sono insufficienti al bisogno, e inoltre non possono essere istituiti se non nei paesi che abbiano almeno 200 fanciulli tra i 7 e 12 anni, lo Stato ha provveduto e provvede fin dove gli è possibile colla creazione di scuole isolate [*escolas isoladas*].

Tali scuole possano (sic!), in un certo senso, essere paragonate alle scuole rurali in Italia; si distinguono però in varie categorie:

1^a – Scuole isolate che si trovano in sede di Municipio, anche là ove dovrebbe trovarsi uno o più *grupos*, ossia una scuola completa: queste scuole dovranno sparire di mano in mano che lo Stato potrà istituire la scuola completa, o *grupo*;

2^a – Scuole isolate situate in sobborghi (sic!) o in sede di distretto di pace [*em bairros ou sedes de districtos de paz*];

3^a – Scuole isolate ambulanti: queste ricordano un po' la nostra cattedra ambulante d'agricoltura, ognuna di tale scuola non ha una sede fissa, ma deve trovarsi fra due borghi o sobborghi vicini; riuniti per ferrovia, o distanti al massimo sei chilometri ed il maestro tiene lezioni alternativamente, un giorno in ciascun dei due borghi.

Il maestro di una scuola isolata deve inscrivere non meno di venti e non più di 40 alunni; accoglie gli alunni nella propria casa e, senza esser assunto in servizio regolare dello Stato, riceve da questi materiale scolastico e una retribuzione annua di:

3 contos di reis e 100000 reis, per quelli della 1^a categoria, cioè L. 4860 l'anno (L. 405 il mese);

2 contos di reis e 400000 reis, per quelli della 2^a categoria, cioè L. 3783 l'anno (L. 315 il mese);

1 contos di reis e 800000 reis, per quelli infine della 3^a categoria, cioè L. 2800 l'anno (L. 230 il mese).

Nella sola città di S. Paulo vi sono oggi 145 scuole isolate della 1^a categoria, nell'interno dello Stato e sul litorale, vi sono 1020 scuole isolate di categoria diversa a seconda della località; gli alunni che frequentano tali scuole sono in totale 41660.

Ho visitato tre o quattro *escolas isoladas* della Capitale: hanno naturalmente aule non molto grandi; ma anche qui ho subito rilevato la pulizia davvero mirabile dei locali; ho rilevato anche che, pur trattandosi di scuole a tipo rurale, il maestro sa insegnare bene, avendo il suo regolare diploma di licenza della scuola normale; e insegna bene e volentieri anche perché la retribuzione che lo Stato gli accorda (specialmente a quelli della 1^a e 2^a categoria) è sufficiente per vivere con dignità.

Le scuole italiane di S. Paulo – non escluse le dieci o dodici discrete o meno peggiori – non possono dunque reggere il confronto con le scuole brasiliane, sia coi *grupos escolares* sia con le *escolas isoladas*; e meno ancora possono reggere il confronto con le scuole e coi collegi privati sia brasiliani sia stranieri⁷⁹.

⁷⁹ Ho già accennato alla «scuola americana» che costituisce il corso elementare preparatorio al Maekenzie College; altri collegi e scuole private esistono in S. Paulo, con insegnamento primario e secondario, quali: l'Instituto Silvio de Almeida e l'Instituto de Ciencias e letras, brasiliani, il Collegio Anglo-brasilero (inglese) il Collegio Kuhlmann (tedesco), la Deutsche Schule, gruppo

Perché meravigliarsi quindi, se le famiglie italiane mandano i propri figliuoli negli istituti stranieri o se fanno a gara per inscriverli nelle scuole primarie brasiliane?

Per parlar solo della capitale, si può calcolare che oggi, degli 11.770 alunni che frequentano i *grupos* e le *escolas isoladas* della città di S. Paulo, almeno 3.500 sono italiani, e ancor più sarebbero se – come ho detto più volte – le scuole brasiliane fossero in maggior numero⁸⁰.

Ma tra pochi anni, allorquando il Governo avrà fatto ciò che si propone e che pubblicamente ha annunziato, anche i 4.000 alunni delle nostre scuole italiane – ove queste non siano sostituite con vere e proprie scuole meritevoli della stima e della fiducia della colonia – passeranno senz'altro nelle scuole brasiliane.

Il Presidente Tibiriça, nel ricordato messaggio del 14 luglio u.s., ha infatti esplicitamente dichiarato che “la deficienza delle scuola deve sparire”; mi consta poi, da informazioni dirette, favoritemi cioè dal Dr. Rodrigues ispettore generale dell'insegnamento primario, che il Governo vuole creare nella capitale altri quindici *grupos* o scuole complete, che già sono pronti i progetti di costruzione per i quindici nuovi edifici, che già si è scelta la località per ciascuno di essi. Aggiungo ancora che è proposito del governo chiedere al Congresso, entro il corrente anno i fondi necessari, volendo istituire le nuove scuole entro il triennio 1908-1911⁸¹.

Ora che cosa si deve e si può fare a favore delle scuole elementari italiane, per mantenere veramente vivo il ricordo della terra d'origine, per diffondere la lingua l'istruzione italiana tra i figli dei nostri coloni, operai e contadini? Si avverta che qui intendo parlare solo dell'educazione e istruzione di quella parte più numerosa che non continua negli studi oltre il corso elementare; e ciò non perché questa grave questione, non sia intimamente connessa nei suoi effetti con quella che si riferisce all'educazione e istruzione di coloro che seguitano negli studi nel corso medio e secondario, e che in S. Paulo non sono pochi, ma perché le due questioni debbono essere considerate come distinte rispetto alla soluzione che sarebbe desiderabile dare all'una ed all'altra.

Una buona scuola italiana d'istruzione media o secondaria, che non sia inferiore alle scuole e ai collegi stranieri già esistenti nella città di S. Paulo, richiederà certo una spesa non indifferente per l'impianto e per i primi tre o quattro anni di vita; ma ha la certezza di poter poi bastare a sè stessa e di divenir anche una non disprezzabile impresa finanziaria. Ciò che si deve spendere invece per il mantenimento di buone scuole elementari, destinate in modo speciale alle classi popolari è, come suol dirsi, a fondo perduto, perduto ben inteso se si vuol considerare il mantenimento di tali scuole dal lato esclusivamente finanziario della spesa immediata; ma spesa anch'essa non meno utile e vantaggiosa, se si pensa al profitto che deriverà alla madre patria – profitto economico oltre che morale – dall'edu-

di tre scuole fondate e mantenute dalla Società per la diffusione delle scuole tedesche (Verein Deutsche Schule) ecc. Intorno a questi e agli altri Istituti privati ove s'impartisce il solo insegnamento secondario, ho riferito in modo particolare all'On. Consiglio Centrale della “Dante Alighieri”. Qui basterà dire che ognuno di questi collegi o scuole ha edificio proprio, per lo più appositamente costruita con aule degne di questo nome, con insegnanti abilitati al magistero e retribuiti con stipendio sufficiente.

⁸⁰ Le domande d'iscrizione superano e di gran lunga il numero dei posti disponibili, e perciò è prescritto ai Direttori di procedere al sorteggio fra tutti gli aspiranti alla iscrizione stessa (art. 640, paragrafo 2 segg. del Regolamento 28 Novembre 1904 approvato col Decreto n. 1253).

⁸¹ La spesa prevista è di circa sette milioni di lire, cioè mezzo milione per ogni edificio. Se si tiene conto del fatto che il Governo fondò 14 *grupos* e ben 500 *escolas isoladas*, nel triennio 1904-907, e che il Congresso accorda sempre molto volentieri i fondi per la istituzione di nuove scuole, non v'è da dubitare dei propositi del Governo.

care e istruire italianamente migliaia e migliaia di futuri operai e agricoltori in un paese nuovo, destinato senza dubbio a un grande e fortunato avvenire.

Solo di quest'ultima consenta l'E.V. che io tratti nella presente relazione; dell'altra questione – che è assai più semplice – ho detto nella relazione per l'On. Consiglio Centrale della «Dante Alighieri».

Dare sussidi anche in maggior misura, alle scuole elementari italiane della città di S. Paulo – quali sono oggi – non è un rimedio che meriti di esser discusso; è opinione di non pochi, anzi, che i sussidi distribuiti dal Consolato per la somma totale di L. 9000, a trentasei delle cinquanta scuole iscritte al Consolato stesso nell'anno scolastico 1905-06, in confronto con le sole L. 1900 divise fra cinque appena di dette scuole, nel precedente anno scolastico, abbiano piuttosto compromessa la questione che non avviata verso la soluzione⁸².

Quei sussidi infatti sono stati dati non a trentasei scuole, bensì a trentasei tra maestri e pseudo-maestri; la somma toccata a ciascuno è stata certo di poco conto; ma fosse stata anche maggiore, qual beneficio sarebbe venuto alla scuola?

Preme a me di far rilevare all' E.V. che qualsiasi sussidio assegnato direttamente alle persone dei maestri, non può in alcun modo impedire – ove non si provveda subito altrimenti – che le scuole italiane corrano il serio pericolo di sparire del tutto nella città di S. Paulo, per il continuo aumento delle scuole brasiliane. Fra tre anni, se i quindici nuovi *grupos* saranno istituiti, come del resto non si può mettere in dubbio, le nostre scuole si spopoleranno perché, oltre all'esser di tanto inferiori, esse sono tutte a pagamento, mentre le brasiliane sono gratuite⁸³.

Il rimedio radicale, o per dir meglio il provvedimento ideale, il più completo, non sarebbe che questo: aiutare la colonia a fondare dieci o dodici scuole coll'intero corso elementare, con locali decorosi o sufficienti, capaci di accogliere per ciascuna scuola tre o quattrocento alunni, con apposito insegnante in ogni classe, scuole popolari, pei figli cioè degli operai e dei contadini, e quindi del tutto gratuite.

Questo il programma massimo, o, ripeto, l'ideale che il Comitato di S. Paulo dalla «Dante Alighieri», sorto da pochi mesi e formato da ottimi elementi, ha a lungo discusso col sig. Console Cav. Baroli, e con me; questo l'ideale che il Comitato si propone di raggiungere, ove lo soccorrano le forze vive della colonia e larghi e continui aiuti non gli manchino dalla madre patria.

Un simile programma richiede però molti e molti mezzi finanziari non poco tempo; d'altra parte, ciò che è più urgente, pel momento, non è tanto che le scuole debbano esser fin da ora completamente gratuite, quanto che vi siano subito alcune buone e vere scuole, con buoni e veri maestri. È perciò intendimento del Comitato locale della «Dante» di promuovere nei rioni o quartieri abitati dai nostri operai la costituzione di Società di Mutuo Soccorso o per di meglio di cooperative, in cui i soci paghino una modesta quota mensile o settimanale, avendo poi il diritto di mandare i propri figliuoli gratuitamente alla Scuola aggregata alla Società e di frequentarla essi stessi alla sera⁸⁴.

Queste scuole che dovrebbero sorgere presso Società rionali non aventi altro scopo che l'educazione e l'istruzione dei figli dei soci, rimarrebbero sotto la diretta – amministra-

⁸² Quattro scuole ebbero L. 500 ciascuna; otto L. 300; ventidue L. 200; due L.100 ciascuna. I trentasei insegnanti, (fra i quali i buoni son ben pochi) considerarono il sussidio come approvazione e riconoscimento ufficiale delle rispettive scuole.

⁸³ Gratuite in senso ancor più large che non le nostre scuole comunali, poiché alcuni libri di testo, i principali, sono distribuiti in dono a tutti gli alunni.

⁸⁴ È ciò che si fa in altre colonie dell'America del Sud e nello stesso Stato di S. Paulo in alcuni paesi dell'interno

zione e vigilanza del Comitato della “Dante Alighieri”, il quale si assumerebbe l’incarico di provvedere alla spesa, sia per i locali sia per gli insegnanti; e poiché le quote pagate dai soci della società rionali non potrebbero certo essere sufficienti a coprire tutte le spese, il Comitato provvederebbe al deficit, sia con l’eventuale concorso della colonia sia con l’aiuto regolare e costante del governo patrio.

Ma anche per far questo, che è il meno che si possa fare, sono necessari non pochi denari. Una piccola casa in affitto, ove sia possibile aprire tre aule che possano contenere cinquanta e sessanta bambini per ciascuna, costa, anche in un quartiere popolare della città circa 250000 reis di stipendio mensile il mese; i tre insegnanti dovrebbero ricevere almeno 250000 reis di stipendio mensile per ciascuno (si ricordi che i maestri brasiliani hanno 250000 reis il mese, nelle scuole isolate della città, 350000 reis, nei *grupos* e scuole complete); la spesa adunque per una scuola col solo corso inferiore salirebbe a un conto di reis circa il mese, cioè a L. 1570. Perciò, tenuto conto delle quote mensili che il comitato della “Dante” dovrebbe riscuotere in proporzione dai padri di famiglia riuniti in cooperativa di mutuo soccorso, la spesa effettiva sarebbe sempre di almeno un migliaio di lire il mese; e queste per una scuola colle sole tre prime classi.

Ad ogni modo io ho vivamente incoraggiato il Comitato ad iniziare a qualunque costo la grave impresa, assicurando che avrei esposto all’E.V. lo stato miserrimo delle attuali scuole e la necessità assoluta di procedere di mano in mano per via indiretta, alla loro eliminazione: per via indiretta, dico, cioè colla istituzione di buone scuole, poiché, com’è naturale, non si può purtroppo impedire a chicchesia di esercitare l’ufficio d’insegnante in terra straniera.

Oltreché della questione finanziaria, il Comitato locale della “Dante Alighieri” si preoccupa e non a torto della scelta degli insegnanti. Fin dove sarà possibile esso cercherà di valersi dei pochi buoni che sono oggi in S. Paulo; ma non è probabile che questi vogliano abbandonare e chiudere la propria scuola, né sarebbe del resto desiderabile che ciò avvenisse, poiché in tal caso, delle settanta scuole, le prime a cedere il campo sarebbero proprio le discrete o meno peggio.

Forse provvedimento migliore – dato che il Comitato riesca a istituire una prima sua scuola – sarebbe quello si (sic!) scegliere qui in Italia, per mezzo dell’On. Consiglio centrale della “Dante”, alcuni giovani e buoni maestri che dessero affidamento di serietà e di buon volere; ma queste del resto, come alcune altre, sono quistioni particolari e di minor conto che possono a suo tempo esser risolte senza difficoltà.

Il Comitato s’è posto all’opera con fervore, e da quanto si risulta avrebbe già concluso qualche cosa. Nei giornali italiani di S. Paulo del 12 agosto u.s. ho letto, e la notizia fu pubblicata anche dalla «Tribuna» di Roma del 4 settembre u.s. n. 245, che il «Comitato si è assicurato l’appoggio degli industriali del Bras (quartiere popolatissimo di operai) per aprire un asilo infantile e una scuola elementare comprendente le prime tre classi». Asilo e scuola verrebbero aperti col nuovo anno scolastico, «volendosi provvedere in modo degno di locali, all’arredamento, alle scelte del personale, ecc.»⁸⁵.

⁸⁵ La fondazione di tre o quattro asili d’infanzia è indispensabile. Ho notato che dei 4000 alunni frequentanti le scuole italiane, quattro o cinquecento almeno hanno un’età che varia dai tre ai cinque anni; il solo asilo o giardino d’infanzia esistente in S. Paulo e a cui provvede il Governo, dello Stato, è affatto insufficiente al bisogno. Esso è però degno di ammirazione per la splendida palazzina ove è situato, e per l’ordinamento disciplinare e didattico; è diviso in tre classi (nella 1^a hanno posto i bambini dai 3 ai 4 anni, nella 2^a i bambini dai 4 ai 5 anni, e nella 3^a quelli dai 5 ai 6 anni) con apposita maestra per ogni classe, con la maestra di musica e con una direttrice. Questa ha lo stipendio uguale a quello assegnato ai direttori delle scuole elementari, cioè 4 contos di reis l’anno (L. 6300); le insegnanti sono pagate alla lor volta nella stessa misura

E già qualche cosa: ma veda V.E. di poter aiutare il più possibile l'inizio di questa organizzazione di scuole, di questa *restauratio ab imis!*

Lo scorso anno, sull'esercizio 1905-06 l'E.V. ha assegnato al Consolato di S. Paulo la somma di circa lire ventimila, s'io non m'inganno, per sussidi a tutte le scuole italiane dello Stato. Se V. E. potesse nel corrente anno accordare al Consolato stesso la somma di almeno cinquantamila lire, dando facoltà al Sig. Console di destinare metà della somma alle scuole dell'interno (meritevoli e bisognose di aiuto) e l'altra metà alle scuole aperte per iniziativa del Comitato locale della «Dante Alighieri» nella capitale dello Stato, se V.E. questo facesse anche negli anni successivi, il Comitato potrebbe a poco a poco svolgere il programma minimo e avviare il grave problema dell'istruzione primaria verso la desiderata soluzione⁸⁶.

Poche parole sulle scuole italiane all'interno e del litorale dello Stato. Il tempo limitato, in cui dovevo condurre a termine le indagini, per conto dell'On. Consiglio centrale della «D.A.» non mi ha permesso di visitare che quelle di Santos, Campinas e Espirito Santo de Pinhal: ho avuto però diretta notizia di alcune altre, quali di Anparo, di S. Carlos de Pinhal, Riberão Preto ecc. Le scuole dell'interno sono in generale assai migliori di quelle della capitale. Quasi tutte sono state costituite da Società di Mutuo soccorso e precisamente con gli stessi criteri ai quali il Comitato dalla «D.A.» di S. Paulo intende di attenersi per raggiungere il primo immediato fine, di cui ho detto più sopra. I soci, pagando una tassa mensile più o meno lieve, hanno la scuola gratuita per i propri figlioli e, ove vogliono, anche per sé, alla sera; gli insegnanti sono direttamente pagati dalla Società, la quale provvede anche ai locali, al materiale scolastico ecc.

Ognuno dei gruppi coloniali formati nei principali paesi dell'interno, è – giova notarlo – più unito, più compatto che non quello numerosissimo abitante nella capitale: quivi è difficile ottenere unità d'azione perché gli italiani sono molti (circa centomila) di troppo varia condizione; nei paesi dell'interno e del litorale invece, l'opera concorde è più facile. Cosicché, mentre nella città di S. Paulo abbondano le Società e i Circoli di Italiani, di questa o di quella regione, (piemontesi, lombardi, toscani ecc.) nessuno dei quali è però così forte e così ricco da avere un locale di sua proprietà⁸⁷, a Santos, Campinas, a Espirito Santo de Pinhal ecc., le Società di italiani riuniscono tutti gli elementi principali della colonia e hanno sede in una casa, più o meno grande, ma di loro esclusiva proprietà, sia per terreno, sia per locali.

D'altra parte, il maestro o i maestri in queste scuole, ricevono uno stipendio fisso; non hanno quindi alcuna preoccupazione, non temono concorrenza di colleghi e dedicano

fi ssata per i maestri dei *grupos*, cioè 3 contos e mezzo di reis l'anno (lire 5700). Si tratta dunque di un giardino d'infanzia veramente modello.

⁸⁶ Nell'attesa che l'aiuto della madre patria permetta di porre mano alla istituzione di nuove scuole, il Comitato locale della «D.A.» vuole intanto occuparsi delle scuole esistenti iscritte presso il Consolato. Il Consiglio Direttivo, che è composto di persone estranee alla classe degli insegnanti, ha assunte per incarico del Sig. Console la vigilanza su tali scuole. Il Consiglio costituirà delle commissioni rionali per visite e ispezioni periodiche; ciò gli permetterà di rendersi esatto conto sia del valore degli insegnanti sia del numero degli alunni, e di raccogliere quindi elementi e dati di fatto necessari per porre mano gradatamente allo svolgimento del programma suaccennato. A tale scopo, ha compilato una scheda (v. appendice n° 6) per la raccolta delle notizie, scheda che il Comitato distribuirà alle Commissioni rionali.

⁸⁷ Il banchetto di saluto offerto il giorno dello Statuto nel corr. anno al Signor Console Cav. Baroli, e di congedo al Dr. Tedeschi, viceconsole già reggente il Consolato generale, ebbe luogo in un salone della Società tedesca, non avendo la colonia luogo di riunione di sua proprietà. Eppure, i tedeschi saranno nella città di S. Paulo non più di quindici o ventimila, a dir molto!

l'opera loro alla scuola, con profitto che potrà essere vario, a seconda delle singole attitudini, ma che è sempre superiore al profitto dato dagli insegnanti nelle scuole italiane della capitale, anche dai pochi buoni e mediocri, poiché questi sono assillati dalla concorrenza dei molti, vedono nell'alunno non solo il fanciullo da educare e da istruire, ma soprattutto il figlio di chi paga, e dell'alunno sono talvolta costretti ad andare alla ricerca! Certo, le scuole dell'Interno potrebbero essere più frequentate, e avere un numero maggiore di classi di insegnanti per ciascuna, ove più efficacemente fossero aiutate da codesto On. Ministero; certo una parte dei figli dei nostri coloni è perciò di necessità costretta a iscriversi nelle scuole brasiliane (bellissime e ben ordinate anche nell'interno): epperò se l'E.V. vorrà far in modo che il Consolato possa disporre di almeno venticinquemila lire all'anno come già dissi, per sussidi alle scuole dell'interno, queste daranno senza dubbio risultati migliori.

Naturalmente la mia proposta è ridotta al minimo ch'io reputo indispensabile, poiché anche per dette scuole sarà fra non pochi anni necessario studiare i provvedimenti opportuni per renderle quasi del tutto gratuite; chè altrimenti esse pure correranno il pericolo di sparire a poco a poco dinnanzi al continuo incremento delle scuole brasiliane gratuite.

Eccellenza,

In un'appendice alla presente relazione, ho riassunto le principali notizie e informazioni intorno a ciascuna delle cinquantadue scuole italiane della capitale, e delle tre o quattro dell'interno, da me visitate. In altra appendice mi sono permesso di richiamare l'attenzione dell'E.V. sulla distribuzione del materiale scolastico e dei libri di testo alle scuole stesse. Giunto alla fine del mio rapporto, mi consenta V. E. di esprimere il fervido augurio che gli Istituti di Istruzione italiana nello stato di S. Paulo siano in un prossimo avvenire degni di quella forte e laboriosa colonia e possano tornare ad onore e decoro della nostra Italia. Mi consenta di esprimere l'augurio che non abbia a ripetersi per l'avvenire ciò che è accaduto nel 1903: in una pubblicazione diffusa a migliaia di copie, e preparata per l'esposizione di S. Louis da una Commissione all'uopo incaricata dal Governo dello Stato di S. Paulo, si discorre a lungo delle scuole e istituti brasiliani, si discorre a lungo e con parole lusinghiere di tutti i collegi e scuole private straniere; non un cenno, non una parola però intorno alle scuole italiane!⁸⁸

Forse le hanno risparmiato per non volerne dir troppo male?

In uno Stato di due milioni e mezzo o tre milioni al massimo di abitanti dove vivono ben ottocentomila italiani, è indispensabile che questi debbano guardare alle proprie scuole con simpatia e con compiacenza, non con tristezza per la scarsità dei mezzi, come avviene oggi nell'interno dello Stato, e peggio con ripugnanza o disprezzo, come avviene oggi nella città di San Paulo.

Parte II

Le scuole medie brasiliane

Le scuole brasiliane nello Stato di S. Paulo, ove s'impartisce l'insegnamento medio e secondario, sono:

- a) Scuole complementari [*Escolas complementares*]
- b) Scuola normale [*Escola Normal*]

⁸⁸ La pubblicazione è scritta in inglese e reca il titolo: *Education in the State of S. Paulo (Brazil, S. A.), by the sub-committee on education for the S. Paulo exposition preparatory to the Exposition in S. Luiz*. La Commissione a cui il Governo deferì il mandato di compilare tale relazione fu composta dal Direttore della scuola normale, da un funzionario dell'Amministrazione scolastica, e dal Direttore del Mackenzie College; quest'ultimo per gli Istituti privati stranieri.

- c) Ginnasi [*Gymnasios*]
- d) Scuola di commercio [*Escola de Commercio*]
- e) Scuole complementari

Il programma di studio corrisponde press'a poco a quello delle nostre scuole complementari femminili e delle scuole tecniche; comprende infatti le lingue portoghese e francese, la storia e geografia, l'aritmetica elementare e l'algebra fino alle equazioni di 2^a grado, la geometria piana, le scienze fisiche e naturali, i primi elementi di scrittura mercantile, la morale e l'educazione civica, il disegno e la calligrafia ecc. Ai maschi s'insegna anche il lavoro manuale, consistente nella lavorazione elementare del legno e del ferro, e perciò in ogni scuola v'è una piccola officina. Il corso dura quattro anni: vi sono a messi gli alunni che hanno superato l'esame di licenza dalle scuole primarie.

Nella legge dell'8 settembre 1892 n° 88, era detto che in tutti i municipi si dovesse istituire una scuola complementare ogni dieci scuole primarie (art. 11) ma in realtà ciò non si è ancora fatto: le scuole sono appena cinque in tutto lo Stato, una nella capitale ed annessa alla Scuola Normale, le altre quattro a Campinas, Itapetininga, Piracicaba e Guarantingueta. Il numero totale degli alunni iscritti era nel corrente anno di 1042; di questi solo una parte (circa un terzo) continua gli studi nel corso normale.

L'attestato di licenza delle scuole complementari abilita (legge citata, art. 16) all'ufficio di *adjunctos* (assistenti e supplenti) nelle scuole elementari; con la legge del 3 settembre 1895 n. 374, esso era riconosciuto titolo sufficiente per adire ai concorsi per l'ufficio di maestre elementare, quando il candidato avesse compiuto un anno di tirocinio in una delle scuole primarie dello Stato; ma, come ho detto poc'anzi (p. 30, nota), tale concessione è da qualche anno di fatto abolita, dato il numero sempre maggiore dei licenziati dalla Scuola Normale che nei concorsi hanno naturalmente la preferenza, ed oggi è per esser cassata con legge speciale.

Gl'insegnanti delle scuole complementari sono eletti per concorso e godono lo stipendio di cinque contos di reis e 400000 reis (circa 8400 lire l'anno); la direzione, salvo per quella annessa alla Scuola Normale, che dipende dal Direttore di quest'ultima, è affidata per incarico ad uno degli insegnanti con la retribuzione annua di 600000 reis l'anno (L. 1000 circa).

Scuola normale⁸⁹

La Scuola Normale non è veramente una scuola media e secondaria poiché è fine a sé stessa. L'intero corso dura quattro anni e comprende le seguenti cattedre, ciascuna delle quali è affidata ad apposito insegnante:

1. – Cattedrale di lingua portoghese e di latino, nei primi tre anni;
2. – di storia della lingua portoghese, nel quarto anno;
3. – di lingua francese, nel primo e secondo anno;
4. – di lingua inglese, nel terzo e quarto anno;
5. – di aritmetica e algebra, nel primo anno;
6. – di geometria e trigonometria, nel secondo anno;
7. – di meccanica, fisica e chimica, nel terzo anno;
8. – di storia naturale, di fisiologia elementare e di igiene, nel quarto anno;
9. – di Geografia generale e del Brasile in particolare, nel secondo anno;
10. – di storia generale e del Brasile in particolare, nel quarto anno;
11. – di scrittura mercantile, del terzo anno;
12. – di Pedagogia, nel quarto anno;
13. – di calligrafia e disegno, nei primi tre anni;
14. – di musica, nel secondo e terzo anno;

⁸⁹ V. Alleg. fasc. 2 (n. 1).

15. – di lavoro annuale (pei maschi nei primi tre anni, in officina annessa alla scuola);

16. – di lavori donneschi (per le femmine, nei primi tre anni);

17. – di esercitazioni pratiche e guida all'insegnamento, nel terzo e quarto anno.

Gli insegnanti nominati per concorso hanno lo stipendio di sei contos di reis l'anno, cioè circa L. 9.420; il direttore riceve invece dieci contos di reis cioè L.15.700 all'anno.

Alla Scuola Normale, in locali separati ma tutti compresi nel medesimo recinto, sono uniti il giardino d'infanzia, la scuola elementare modello e una scuola complementare. Il direttore della Scuola normale vigila su tutti questi istituti di vario grado, coadiuvato da un ispettore che soprintende al giardino d'infanzia e alla Scuola primaria modello.

Tale è l'ordinamento della scuola normale, stabilito con la legge del 3 settembre 1895 n. 374. In quella dell'otto settembre 1892 N.88 si era prescritto che le scuole destinate alla formazione degli insegnanti per scuole primarie e complementari fossero quattro in tutto lo Stato; ma finora solo la capitale ha una scuola normale, frequentata nel corrente anno da 309 alunni. Il diploma di licenza è titolo necessario per prender parte ai concorsi per l'ufficio di insegnante sia nelle scuole primarie sia nelle complementari: per queste ultime hanno naturalmente la preferenza coloro che possono vantare un certo numero di anni di servizio nelle scuole primarie dello Stato.

1. Ginnasinas;⁹⁰

Colla legge dell'8 Settembre 1892 n.86 il Governo assumeva l'impegno di creare tre ginnasi nello Stato: due furono istituiti subito, l'uno nella capitale, l'altro a Campinas, il terzo fu aperto in quest'anno, e precisamente il 1^a Aprile u.s. a Riberão Preto.

L'intero corso dura sei anni; i licenziati hanno il titolo di baccelliere in scienze e lettere, corrispondente alla nostra licenza liceale, col diritto di essere ammessi all'Università e Istituti Superiori.

Il programma comprende questi insegnamenti, ciascuno dei quali costituisce una cattedra con apposito professore:

- a) lingua portoghese, nei primi tre anni; storia della lingua, nel quarto anno; letteratura portoghese, nel quinto e sesto anno;
- b) lingua francese, nei primi tre anni; letteratura francese, nel sesto anno;
- c) lingua inglese, nel secondo, terzo e quarto anno; letteratura inglese, nel sesto anno;
- d) lingua tedesca nel quarto, quinto e sesto anno;
- e) lingua latina, nel terzo, quarto e quinto anno; letteratura latina nel sesto anno;
- f) lingua greca, nel quarto quinto e sesto anno;
- g) Lingua italiana, nei primi tre anni;
- h) Aritmetica, nel primo e secondo anno; algebra nel secondo, terzo e quarto anno; geometria e trigonometria elementare nel terzo e quarto anno;
- i) Meccanica e astronomia, nel quinto anno;
- j) Fisica e chimica, nel quinto e sesto anno;
- k) Storia naturale, nel quinto e sesto anno;
- l) Geografia, nel primo, secondo e terzo anno;
- m) Storia generale e del Brasile, negli ultimi tre anni;
- n) Logica, nel sesto anno;
- o) Disegno, nei primi quattro anni;

Gli insegnanti sono nominati per concorso, e godono lo stipendio di sei contos di reis l'anno, cioè lire 9420 circa, al direttore è assegnato lo stipendio di 9 contos di reis, cioè L. 14130 all'anno.

⁹⁰ V. Alleg. fasc. 2^a (n. 2).

Gli iscritti pel corrente anno nei Ginnasi della capitale e di Campinas sommarono a 267. I licenziati del Ginnasio avevano per legge il diritto di prender parte ai concorsi per l'ufficio di insegnante nella scuola primaria (legge 3 settembre 1895 n. 374, art.2, paragrafo terzo); ma, come ho già avvertito per i licenziati dalle scuole complementari, la concessione è in effetto resa vana da qualche tempo e sarà abolita con prossima legge. Essi hanno però il diritto di concorrere alle cattedre nelle scuole complementari, quando abbiano sostenuto gli esami in quelle speciali discipline che si studiano solo nella scuola normale.

2. Scuola di Commercio⁹¹

È di recente istituzione: fu infatti fondata nel 1902, per iniziativa privata di alcuni cittadini, nella città di San Paulo.

Con Decreto del 9 Gennaio 1905 n. 1339 il Governo federale la dichiarò pareggiata per tutti gli effetti di legge all'Accademia di Commercio di Rio de Janeiro, autorizzandola come tale a rilasciare un diploma che abilita all'esercizio di perito-ragioniere (guarda livros, perito judicial ecc.), dopo un corso di tre anni di studio, e un diploma che dà il diritto di concorrere agli uffici di agente consolare, di funzionario del Ministero degli Affari Esteri, di Direttori di Istituti bancari ecc., dopo un corso di cinque anni di studi.

Come è evidente non si tratta di una scuola media, poiché anche per il corso inferiore, che dura tre anni, può essere paragonata ai nostri Istituti Tecnici (sezione commercio – ragioneria), essendo dunque fine a sé stessa; quanto al corso che dura cinque anni e che sotto un certo rispetto ricorda le nostre scuole superiori di commercio, la scuola può considerarsi come un istituto di istruzione superiore.

Nei primi tre anni si studiano le lingue portoghese, francese e inglese, le matematiche, le scienze fisiche e naturali, la storia, e la geografia, la contabilità e gli elementi principali di diritto con particolar riguardo al commercio; nel quarto e quinto anno, che costituiscono il corso superiore, si studiano le lingue italiana, tedesca e spagnola, la geografia commerciale, la storia del commercio, il diritto internazionale, l'economia politica, la tecnologia ecc. Sono ammessi gli alunni che abbiano almeno 16 anni, dopo aver superato uno speciale esame nelle lingue portoghese, francese, inglese e in matematica.

La scuola è, si può dire, all'inizio; essa avrà tra breve il corpo insegnante al completo, e una sede di sua esclusiva proprietà, grazie alla munificenza del Conte A. Alvares Penteadó di San Paulo che donò parecchie centinaia di contos di reis, per la costruzione di un edificio, pel quale egli aveva precedentemente offerto il terreno⁹².

Lo stipendio degli'insegnanti corrisponde a quello fissato per i professori della scuola normale e del ginnasio.

Ho visitato una scuola complementare, la scuola normale e il ginnasio della capitale: della scuola di commercio mi sono limitato a studiare il programma e il funzionamento del corso inferiore; del superiore non mi sono occupato in modo particolare, trattandosi di un corso di studi speciali⁹³.

⁹¹ V. Alleg. fasc. 2^a (n. 3).

⁹² L'opera del conte A. Penteadó può esser paragonata a quella del Senatore Bocconi di Milano, a cui si deve l'università Commerciale. A opera terminata il Penteadó avrà speso cento reis di un milione.

⁹³ – Nello Stato di S. Paulo esistono nella capitale altri due Istituti di istruzione superiore, che ho pure visitato, ma dei quali è inutile discorrere qui. Basterà che io dica che questi sono: 1^o Eschola Polytecnica, dipendente dal governo dello Stato, per allievi ingegneri (civili, industriali, agronomi, ecc.); il corso dura cinque o sei anni, a seconda delle sezioni; gli insegnanti sono in numero di ventotto, con quattordici assistenti otto istruttori pratici. Il Politecnico ha in sede in uno splendido e grandioso palazzo, dove oltre ai numerosi gabinetti scientifici, vi sono ben 40 grandi aule e un salone o aula magna: gli alunni iscritti erano nel corrente anno 150 circa. 2^a Facoltà

Rispetto ai locali, è inutile riportare che tanto la scuola complementare e la normale quanto il ginnasio hanno posto in edifici appositamente costruiti e quindi molto decorosi. Rispetto all'efficacia dell'insegnamento ho osservato che è data molta importanza allo studio delle lingue straniere, soprattutto nella scuola normale: la grammatica è lasciata quasi da parte, l'insegnante si sforza di ottenere che gli alunni imparino fin dai primi giorni ad esprimersi nella nuova lingua, e questa egli usa anche cogli alunni della prima classe fin dalla prima lezione. Ho assistito a varie lezioni di francese ed inglese nel corso normale e ho rilevato che gli alunni discorrono con discrete facilità nell'una e nell'altra lingua, mentre ciò non avviene di frequente nelle nostre scuole medie.

In generale poi danno buoni risultati le scuole complementari, ove l'insegnamento di parecchie discipline, affini tra loro, è affidato a un solo professore ed è diviso per classe come nel nostro ginnasio. Gli insegnanti che hanno compiuto i loro studi nella scuola normale, sono sufficientemente preparati, e giova loro aver iniziata la carriera scolastica nelle scuole primarie.

Non meno buono è il risultato ottenuto nella Scuola normale, per il fatto che oggi il corpo insegnante è quasi tutto composto, per le materie principali, di persone che hanno studiato all'estero; lo stesso direttore, dr. Oscar Thompson⁹⁴, laureato in legge, ha seguito corsi di studi speciali e di perfezionamento negli Stati Uniti del Nord.

Non altrettanto buono invece è il risultato dell'insegnamento impartito nei ginnasi dello Stato. Anzitutto parmi evidente che la distribuzione delle varie discipline, e i limiti fissati per lo svolgimento del programma nei sei anni del corso, non siano dei più felici: in secondo luogo, mentre l'istituto vorrebbe corrispondere a ciò che è il nostro ginnasio-liceo, cioè una scuola media di primo e secondo grado, senza dare tuttavia una spiccata prevalenza all'insegnamento letterario, esso non costituisce in realtà che un tipo di scuola ibrido, un istituto che è forse qualche cosa di più di una scuola media di primo grado, ma che rimane di non poco inferiore a una scuola media di secondo grado, un istituto dove gli alunni non ricevono insomma quella cultura generale sufficiente, indispensabile preparazione per chi intende continuare gli studi nella università e Scuole Superiori.

Nel ginnasio è obbligatorio lo studio di quattro lingue straniere moderne, oltre alla lingua e letteratura portoghese (italiano, francese, inglese e tedesco); ma dato il numero delle lezioni che a ciascuna di queste può essere dedicato, come è possibile che i giovani le apprendano bene? Il ginnasio, pur non volendo essere un istituto classico, comprende lo studio delle lingue e letteratura latina e greca, e insieme il programma impone agli alunni lo studio particolareggiante delle discipline scientifiche e perfino del disegno) ma dato il tempo stabilito per lo svolgimento del programma di ogni singola materia, come può riuscire efficace l'insegnamento? I giovani infatti che vengono licenziati dal ginnasio col

di diritto, dipendente dal governo Federale essa rilascia diplomi di laurea in giurisprudenza. Ha sede propria; gli alunni iscritti erano in quest'anno circa 450. 3^a Eschola de Pharmacia fondata nel 1898: è un'istituzione privata, ma è autorizzata a rilasciare diplomi che abilitano le professioni di chirurgo-dentista e di farmacista. Essa contava nel corrente anno circa 270 alunni. Il governo spende 562 contos di reis l'anno, cioè un milione di lire per il mantenimento del Politecnico; spende inoltre ottantotto contos di reis all'anno per sussidio a tre scuole pratiche di agricoltura, l'una in Piracicaba, l'altra in Iguabè e la terza a S. Sebastião: tali scuole sorsero per iniziativa e con cospicui capitali di privati. Il governo spende ancora 30 contos, cioè circa L. 50.000 l'anno per la biblioteca pubblica e 70 contos cioè L. 110.000 all'anno, per arricchire di nuovi esemplari il magnifico Museo di Storia naturale (Museum Paulista); l'una e l'altra hanno sede nella capitale in edifici appositi, molto grandiosi.

⁹⁴ È nato in San Paulo ed è brasiliano, ma la famiglia deve esser d'origine nord - americana.

diploma di baccellieri in lettere e scienze, non hanno né una cultura classica né una cultura scientifica bastevole, e nell'una e nell'altra sono inferiori ai licenziati del nostro liceo.

Di ciò del resto sono convinti gli stessi brasiliani; di recente anzi il ministro del governo federale di Rio de Janeiro per la pubblica istruzione, dr. Tavez de Lyra, ha presentato al Presidente della Repubblica un disegno di legge per una radicale riforma del ginnasio. Nella sua relazione, il ministro riconosce che «varie sono le cause della decadenza degli studi ginnasiali e che una riforma s'impone»; e illustra poi lo schema del progetto ch'egli ha ideato, per il quale il corso dovrebbe essere diviso in due periodi (*cyclos*): il primo di quattro anni, costituirebbe la scuola media di primo grado, il secondo, di tre anni, comprenderebbe due sezioni, una letteraria, l'altra scientifica, a seconda che gli alunni aspirino al baccellierato in lettere o in scienze⁹⁵.

Ma l'attuale ginnasio brasiliano è inferiore alle nostre scuole medie anche per un'altra ragione. Manca affatto in Brasile una scuola superiore che prepari buoni insegnanti per gli istituti di istruzione media.

Ho detto che la Scuola normale di S. Paulo da oggi buoni risultati per il fatto che non pochi dei professori hanno compiuta o perfezionata la loro cultura all'estero; così è anche di qualche insegnante del Ginnasio della Capitale; ma in generale chi concorre alle cattedre vacanti? Laureati in legge, se si tratta di materie letterarie; laureati in medicina, se si tratta di materie scientifiche (storia naturale in specie); laureati in ingegneria se si tratta di cattedre di matematiche, geografia ecc. Ora, i primi in particolar modo possono avere la preparazione sufficiente, soprattutto ove si tratti di insegnare lingue e letterature classiche?

Della mancanza di istituti superiori di magistero lo stesso Ministro del Governo federale si è preoccupato nella relazione suricordata, affermando che «a melhor solução seria a fundação de Escolas Normas Superiores»; ma in proposito egli non ha presentato finora alcuna proposta concreta. Tuttavia, la fondazione di una scuola superiore di magistero è indispensabile; chè altrimenti qualsiasi riforma introdotta nei programmi del Ginnasio non potrebbe dare mai efficacie risultato⁹⁶.

Nella città di S. Paulo esistono anche alcuni istituti privati brasiliani d'istruzione media, pareggiati al Ginnasio dello Stato. Essi sono:

a) Gynnasio Macedo Soares⁹⁷

Fu fondato solo due anni fa (1906); ha annesso un convitto, che conta oggi 49 alunni. Il Direttore I.E. De Macedo Soares è insegnante di fisica nella scuola normale dello Stato. Nell'istituto si seguono per ciascuna materia i programmi in vigore nel Ginnasio dello Stato, e il corso dura perciò sei anni: oltre al Ginnasio l'istituto tiene anche un corso preparatorio di istruzione elementare.

b) Instituto de Ciencias e Letras⁹⁸

È uno dei più antichi collegi della città di S. Paulo: fu fondato oltre 30 anni fa. Il Convitto ha presentemente un centinaio di alunni: la scuola è frequentata inoltre da 128 alunni esterni. Ha sede in un edificio molto grande, e comprende i seguenti corsi:

⁹⁵ Vedi allegati fasc. 2 (n. 4).

⁹⁶ Il Governo dello Stato di S. Paulo aveva stabilito, con la legge dell'8 Settembre 1892 N. 88, di aggiungere alla scuola normale della capitale un «Curso superior para formar os professores des gynasios ecc.» (art. 23). Il corso sarebbe stato diviso in due sezioni, una letteraria l'altra scientifica per la durata di due anni ciascuna: vi sarebbero stati ammessi i licenziati dal Ginnasio e dalla Scuola Normale, dopo un esame speciale in alcune materie. Questo curso superior non venne mai istituito.

⁹⁷ V. Alleg. Fasc. 2 (n. 5).

⁹⁸ V. Alleg. Fasc. 2 (n. 6).

primario o elementare, ginnasiale ecc. Il Direttore è il Professore Luiz Antonio dos Santos, insegnante nel Ginnasio governativo di lingua e letteratura latina.

c) Instituto Silvio de Almeida⁹⁹

Fu fondato nel 1903: il Convitto ospita oggi 62 alunni e le lezioni sono frequentate anche da 49 esterni. Comprende il corso elementare e preparatorio. Il corso ginnasiale (pareggiato a quello dello Stato), un corso commerciale, e uno infine che mira a preparare gli alunni per l'ammissione alla scuola normale. L'istituto è diretto dal Professore Silvio de Almeida, insegnante di lingua e letteratura portoghese nel Ginnasio dello Stato.

Oltre a questi meritano di essere ricordate il «Gynnasio episcopal»; annesso al seminario vescovile e pareggiato al Ginnasio dello Stato; il «Gynnasio São Bento», tenuto pure da religiosi e pure pareggiato; il «Gynnasio do Carmo», privato ecc.

Non mancano poi, così nella capitale, come nell'interno, altri istituti confessionali diretti da Brasiliani, ove si impartisce istruzione primaria e secondaria, quest'ultima non corrispondente al corso ginnasiale ma con indirizzo tecnico-commerciale; non mancano anche istituti femminili confessionali o laici; degli uni e degli altri è qui superfluo discorrere essendo essi di interesse relativo, almeno per il momento, rispetto alla questione di cui intende occuparsi codesto onorevole Consiglio Centrale.

Parte 5^a

I Collegi e le scuole straniere nella città di S. Paulo

Le istituzioni scolastiche, fondate e dirette da insegnanti stranieri nella città di S. Paulo, possono essere distinte in tre categorie:

Collegi e scuole aventi il carattere di impresa commerciale privata;

Collegi e scuole coloniali, che mirano cioè a soddisfare i bisogni di un dato gruppo di stranieri;

Collegi e scuole aventi un alto fine politico-economico. Appartengono alla prima categoria:

Il «Gynnasio Hydecroft», detto anche Collegio Inglese.

Fondato nel 1899 dall'inglese Alfred Aldridge, che per circa due anni era stato direttore della scuola americana annessa al «Mackenzie college» (per la sola parte amministrativa), l'istituto si era dapprima acquistato una eccellente reputazione, tanto che il convitto aveva raggiunto nel 1901 il numero di 76 alunni, oltre ai non pochi allievi esterni.

In questi ultimi anni il Collegio mutò un paio di volte di proprietario e il numero degli alunni interni diminuì di non poco; presentemente è diretto dall'inglese O. Hansson e gli insegnanti sono gli stessi che prestano servizio in alcuni dei collegi brasiliani e, in parte, nel Ginnasio e nella scuola normale dello Stato; esso ha sede in un quartiere centrale della città e in locali decorosi¹⁰⁰

I programmi d'insegnamento comprendono il corso preliminare e di preparazione al Ginnasio, il corso ginnasiale e completo, secondo i programmi approvati dallo Stato, e perciò il corso è pareggiato al Ginnasio Governativo; infine il Collegio ha anche un corso commerciale, che dura cinque anni.

Gynnasio Anglo-Brasileiro.

Tale istituto porta anche il nome di «Collegio Modelo Inglez». Venne fondato nel 1899 dall'inglese Carlo Armstrong che lo dirige tuttora (sic!). Questi non ha certo molta cultu-

⁹⁹ V. Alleg. Fasc. 2 (n. 7).

¹⁰⁰ V. alleg. fasc. 3 (n. 1).

ra, nè ha fatto, a quanto dicono, un corso regolare di studi superiori: egli era semplice istitutore nel «Mackenzie college», nel quale ufficio aveva fatto prova discreta. Avuti da un parente i denari necessari, occupò un'ampia estensione di terreno nell'Avenida paulista, uno dai quartieri più signorili della città, e costruì un grandioso edificio che può comodamente ospitare i 150 allievi interni, che oggi conta il Collegio, e i 54 esterni che frequentano le lezioni; l'edificio è circondato da un vasto e bel giardino, che comprende anche il campo per il football e il lawn-tennis¹⁰¹.

I corsi di studio sono: il preliminare e corso elementare, il Ginnasiale, pareggiato al Ginnasio dello Stato, e il commerciale. Degli insegnanti, alcuni sono stranieri (inglesi, francesi e tedeschi) altri sono brasiliani.

Il proprietario e direttore ha fatto con molta abilità una straordinaria réclame al suo istituto, sia per mezzo dei giornali sia anche con l'invio di professori nell'interno dello Stato, con l'incarico di dare notizie verbali intorno al collegio, ai direttori e ai maestri delle scuole elementari, alle famiglie ecc.

Tuttavia l'Anglo-brasiliano non pare abbia accontentato in questi ultimi tempi tutte le famiglie, forse perché il proprietario, che ha buone qualità di amministratore, non ha le doti e meno ancora la cultura che si richiedono per dirigere un grande istituto dal punto di vista didattico.

2° – Collegi e scuole coloniali.

Deutsche Schule.

È, come già ho avuto occasione di avvertire (p. 36, nota) un gruppo di tre scuole fondate e mantenute dal «Verein Deutsche Schule», e destinate ai tedeschi che nella città di S. Paulo sono circa quindicimila. Due di queste scuole si occupano soltanto dell'insegnamento elementare; nella terza s'impartisce anche l'insegnamento medio e secondario con indirizzo tecnico-commerciale. Le lezioni sono tenute per la maggior parte in lingua tedesca; è data però notevole importanza allo studio della lingua portoghese sia nel corso primario che nel secondario, e in quest'ultimo s'insegnano anche le lingue francesi e inglesi come discipline facoltative.

Il corso elementare dura dai 3 ai 4 anni, e il corso medio 4 anni; alle tre scuole non è annesso alcun convitto, cosicchè esse servono solo per alunni esterni.

Collegio Kuhlmann.

Fu fondato nel 1901 dal tedesco Prof. Kuhlmann, ed è diretto oggi dal Sig. Alberto Kuhlmann junior.

Sebbene sia stato istituito in modo speciale per la colonia tedesca, tuttavia il collegio accoglie molto volentieri alunni brasiliani; il suo programma è pubblicato anzi solo in lingua portoghese¹⁰².

L'insegnamento comprende: il corso primario, che dura tre anni; il corso intermediario, o preparatorio, pure di tre anni, per quegli alunni che intendono continuare gli studi nella scuola secondaria; il corso medio, infine, con indirizzo commerciale, il quale dura 4 anni. Il corpo insegnante si compone di professori tedeschi, brasiliani e di un francese e un tedesco per l'insegnamento delle due lingue.

3° – Collegi e scuole straniere con intento politico-economico.

Appartengono a quest'ultima categoria la scuola americana e il «Mackenzie College».

Ho già accennato (p. 26-27, e nota) all'origine di questi due importanti istituti, che, sorti l'uno nel 1870, l'altro nel 1890, formano oggi un tutto organico; ho già detto che se essi

¹⁰¹ V. alleg. fasc. 3 (n. 2).

¹⁰² V. Alleg. fasc. 3 (n. 4): il programma della Deutsche Schule, alleg. fasc. 3 (n. 3) è pubblicato nelle due lingue tedesca e portoghese.

si devono alla iniziativa delle missioni presbiteriane degli Stati Uniti del Nord, ciò non significa che il loro scopo sia solo quello di diffondere l'istruzione rigidamente cristiana. Aggiungo qui che tanto la scuola americana quanto il Mackenzie College si propongono anzi un vero e proprio scopo politico-economico. Essi non sono per così dire che un documento irrefragabile della mirabile attività che i Nord-Americani vanno spiegando per nord-americanizzare – mi si passi la parola – l'America del sud, e specialmente il Brasile, paese quasi nuovo, in buona parte ancor poco conosciuto, e campo quindi di azione di più sicuro e più rapido successo.

Nello Stato di S. Paulo non v'è affatto una colonia Nord-Americana, starei per dire che non v'è un Nord-Americano, eccezion fatta degli insegnanti della scuola americana e del «Mackenzie College»; è chiaro dunque che gli Stati Uniti del Nord mirano alla conquista intellettuale del Brasile cercando cioè di diffonder, di rendere popolare, d'imporre i propri metodi d'educazione e d'istruzione, la propria cultura in una parola, nello stesso modo che contemporaneamente mirano alla conquista economica del paese¹⁰³.

Dico imporre: ma con quale e con quanta abilità! Con quanto tatto e finezza!

I programmi d'insegnamento sono pubblicati in portoghese¹⁰⁴; fin dove è possibile il direttore si vale di insegnanti brasiliani; e gl'insegnanti venuti dall'America settentrionale secondano molto bene il direttore nella non facile impresa, ponendo la massima cura, non solo nel non offendere minimamente la suscettibilità degli indigeni, ma nel rendere l'istituto simpatico ai brasiliani, nel convincerli giorno per giorno che il collegio e la scuola americana sono istituzioni di cui essi debbano compiacersi, di cui debbono riconoscere la necessità. La scuola americana e il collegio Mackenzie dipendono direttamente dalla Direzione generale che risiede in New York; hanno sede in edifici e località diversi, così per le aule ove hanno luogo le lezioni, come per il convitto. La prima comprende il corso primario che dura 4 anni, e il cui ordinamento – come sappiamo – servì di modello alle scuole primarie brasiliane; comprende ancora un corso detto intermedio che dura solo un anno, come compimento all'istruzione elementare; comprende il corso secondario, corrispondente esattamente al corso della «Grammar School» dell'America del Nord, di tre anni di durata, seguito sia dagli alunni che intendono continuare gli studi nel Mackenzie College (e in tal caso può considerarsi come il nostro ginnasio inferiore, o scuola media di primo grado), sia da coloro che desiderano terminare con esso la propria istruzione per dedicarsi al commercio. Infine la Scuola Americana comprende un corso normale, a cui sono ammesse le alunne che hanno superato gli esami di licenza dal corso secondario, e le quali aspirino all'ufficio di maestra elementare nelle scuole dipendenti dalle missioni presbiteriane¹⁰⁵: il corso normale dura due anni.

La Scuola Americana rispetto agli edifici si compone di un palazzo, ove si tengono le lezioni dei corsi accennati (rua S. João) e di un altro situato poco distante (rua do Itambè), ove sono ospitati gli alunni interni che frequentano i corsi stessi. La direzione suprema della scuola affidata al Dr. Horace M. Lane, direttore del «Mackenzie College»; questi è coadiuvato però da una direttrice per il corso primario e normale, a cui spetta pure di vigilare sugli alunni interni, presso i quali dimora abitualmente (Miss Louise Nye Moore), e da un vice-direttore, Rufus K. Lane.

Il corpo insegnante della «Scuola Americana», oggi è formato, nel corso primario e intermedio, da maestre, antiche alunne della scuola medesima, equindi tutte brasiliane, eccetto la direttrice; negli altri corsi – secondario di 1° grado e normale – gl'insegnanti sono in

¹⁰³ In quest'ultimo decennio i Nord-Americani si sono studiati di partecipare alle maggiori imprese industriali, bancarie ecc. in tutto il Brasile.

¹⁰⁴ V. alleg. fasc. 3 (n. 5 e 6).

¹⁰⁵ Queste hanno istituito di recente altre scuole americane in vari Stati del Brasile.

parte brasiliani, in parte nord-americani. Nel «Mackenzie College» s'impartiscono l'insegnamento medio di secondo grado, e quello superiore per il corso di ingegneria. Il Collegio, già lo dissi (p. 27, nota) fu «incorporado pelos Regentes da Universidade de Estado de Nova York em Julho de 1890»; da quest'epoca l'istituto è divenuto parte integrante «da Universidade» ed è soggetto «à sua fiscalização».

Inutile ch'io spenda parole per descrivere la estensione del terreno occupata dal Collegio; basti dire che è un vastissimo isolato, dove, sebbene siano stati costruiti quattro o cinque grandi edifici (edifici per le scuole, per dormitori ecc.), rimane ancora immenso spazio per giardino, orto, campo di foot-ball ecc.¹⁰⁶.

L'istituto comprende i seguenti corsi di studio:

1° – corso secondario, che dura tre anni, il primo comune a tutti gli alunni; negli altri due anni il corso, è diviso in due sezioni, l'una classica, l'altra scientifica;

2° – corso commerciale, diviso in due anni, destinato ai giovani che non intendono proseguire più oltre negli studi.

Così all'uno come all'altro corso, sono ammessi gli alunni che hanno compiuto regolarmente il corso medio di 1° grado (Grammar School) presso la Scuola Americana.

Gli alunni che hanno frequentato una delle due sezioni del corso secondario, classica e scientifica, ricevono un certificato di madurez, per il quale hanno diritto di essere ammessi all'Università e agli Istituti superiori dello Stato di New York. Possono naturalmente proseguire gli studi nel Collegio stesso, e nel corso superiore di ingegneria civile (e il diploma di laurea viene direttamente inviato dall'Università di New York), o in uno dei due corsi che dovrebbero abilitare all'insegnamento delle scienze e delle lettere nelle scuole medie. Dico dovrebbero, poiché, per quanto mi risulta, il solo corso superiore che funziona regolarmente è quello d'ingegneria; gli altri due non hanno quasi mai alunni, ma ad ogni modo anche per essi i diplomi debbono essere inviati da New York.

Il personale insegnante del «Mackenzie» è in maggioranza nord-americano¹⁰⁷; ma ciò non impedisce che i libri di testo per parecchie discipline siano scritti in lingua portoghese, e che in questa siano tenute le lezioni di non poche materie. Ripeto ancora una volta che il Collegio svolge l'opera sua con molta sagacia, facendo il possibile per divulgare in Brasile la cultura del Nord, per far trionfare i metodi d'educazione e d'istruzione adottati da tempo nell'America settentrionale, preoccupandosi però di non suscitare la minima diffidenza negli indigeni. Così molti libri di testo sono, è vero, di autore nord-americano; sono infatti pubblicati a Boston, a Cincinnati, a New York, a Chicago, con la precisione e la eleganza consueta ai librai-editori di quella città; ma, come dicevo, sono scritti in lingua portoghese, e il direttore del Mackenzie, quando lo ha creduto opportuno, non ha mancato anche di far compilare libri di testo da insegnanti brasiliani, e di ordinarne poi la stampa negli S.U. del Nord¹⁰⁸.

La Scuola Americana e il «Mackenzie College» contano oggi circa seicentocinquanta iscritti, dei quali più duecento interni e ottantaquattro italiani; ora, anche tenendo conto del fatto che un centinaio di esterni per il buon profitto negli studi e per le disagiate condizioni della famiglia, sono ammessi a frequentare i corsi gratuitamente, è chiaro che

¹⁰⁶ Si veda negli Alleg. Fasc. 3° (n. 6) il programma con le fotografie. Ciò che io dico non deve esser considerato come un'esagerazione: si pensi che l'istituto ospita nel territorio di sua proprietà perfino una vaccheria, senza alcun incomodo dei convittori.

¹⁰⁷ Oltre a qualche insegnante brasiliano, l'istituto ha da circa dodici anni un insegnante italiano, il prof. Cesare Antonelli per la cattedra di lingua latina.

¹⁰⁸ V. Alleg. Fasc. 3 (n. 7): sono alcuni esemplari dei principali libri di testo, pubblicati esclusivamente per uso degli alunni del «Mackenzie».

i due istituti debbono essere attivi come impresa finanziaria: mi si disse però che tutto il guadagno è dedicato a rendere sempre migliore e più complete l'una e l'altra istituzione. Quanto all'efficacia dell'insegnamento e ai suoi risultati, premesso che io nulla posso dire intorno ai corsi superiori d'ingegneria, di scienze e di lettere¹⁰⁹, credo anche inutile esporre la mia opinione intorno al corso primario e a quello secondario: del corso elementare ho già detto parlando delle scuole primarie brasiliane; rispetto al secondario, che dura sette anni, e comprende il corso intermedio (3 anni), il medio di 1° grado (3 anni) e il medio di 2° grado (3 anni), osservo solo che la distribuzione delle varie materie è certo più logica che non sia quella fissata nel programma del ginnasio brasiliano; osservo ancora che il corso è diviso in due distinti periodi, e che nel secondo periodo l'insegnamento per gli ultimi due anni, è con molta opportunità diviso nelle due sezioni scientifica e letteraria. È questa appunto nel suo complesso la riforma che il governo brasiliano intenderebbe introdurre nel ginnasio nazionale (vedi a p. 62); e questa non sarebbe forse una nuova e più grande vittoria dei nord-americani, i quali, dopo le scuole primarie, vedrebbero pure ordinate secondo il loro sistema, anche le scuole medie brasiliane?¹¹⁰

Aggiungerò infine che i due istituti sono molto ben ordinati, per ciò che si riferisce alla disciplina e che l'indirizzo dell'educazione impartita nel Convitto è veramente moderna, nel senso che ai giovanetti è lasciata, compatibilmente coll'età, una certa libertà di azione; che è bandito tutto ciò che può far confondere un istituto di educazione con una caserma militare, e che si trae profitto tuttavia di qualsiasi occasione per far sentire ai giovani la diretta responsabilità di ogni loro atto.

Le famiglie ricevono frequenti notizie sulla condotta e sul profitto degli alunni; ogni semestre poi il direttore generale della «Scuola Americana» e dal Collegio «Mackenzie» invia il prospetto dei voti riportati negli esami semestrali accompagnandolo con una lettera a stampa (relatorie), nella quale dà notizie sui progressi dei due istituti cogliendo l'occasione per vantare i risultati ottenuti e per fare in vario modo l'apologia dei metodi adottati nell'America del Nord¹¹¹.

Io non voglio sostenere che questi siano migliori dei nostri, e per meglio dire di quelli seguiti in Europa, come il direttore afferma senza esitazione, in uno degli accennati relatori¹¹²; certi essi meritano però di esser presi in attento esame, avendo indubbiamente molto di buono.

Parte IV

L'istituzione di una nuova scuola italiana – Suo ordinamento – La spesa necessaria

Dopo quanto ho esposto nelle parti precedenti e specialmente nella prima, non è possibile mettere in dubbio la necessità di provvedere a un migliore ordinamento cosiddette scuole primarie italiane, e l'utilità dell'istituzione di una scuola media italiana. Sulla prima questione mi sono a lungo indugiato; più brevemente dirò qui della seconda.

Se si considera che oggi più di un centinaio di giovanetti italiani frequentano i collegi

¹⁰⁹ Il corso superiore di lettere non aveva alunni nel corr. anno; così dicasi del corso superiore di scienze. Io non avrei avuto, e non ho, del resto, alcuna competenza per dare un giudizio su quest'ultimo, come sul corso d'ingegneria.

¹¹⁰ Anche la Commissione reale, che ha studiato la riforma della nostra scuola media, propone a quanto pare di dividere il Liceo in due sezioni, la classica e la scientifica.

¹¹¹ V. Alleg. Fasc. 3 (n. 8).

¹¹² Nella lettera-circolare del 3 Dicembre 1897, il Direttore del Mackenzie College scriveva «o typo da educação europea è fixo e chrystalizado: o dos Estados Unidos da America do Norte, progressivo e plastico». – Alleg. Fasc. 3° (n. 8).

stranieri in S. Paulo, e che non pochi sono iscritti nel ginnasio brasiliano o in altri degli Istituti più sopra citati, si comprende tutta l'opportunità del progetto di cui codesto On. Consiglio Centrale ha voluto affidarmi lo studio. Mi si permetta di aggiungere che una scuola media è non soltanto opportuna, ma indispensabile, se si desidera che continuino durevolmente quei benefici economici che il nostro Paese già ritrae oggi dalla mirabile attività della numerosa colonia di S. Paulo, se si desidera ch'essi aumentino, coll'importanza sempre maggiore che la colonia va ogni giorno acquistando.

Nello Stato di S. Paulo noi non abbiamo soltanto – per nostra buona ventura – dei coloni coltivatori di caffè, ai quali anzi non sempre li era arida la sorte. Vi sono laggiù molti e molti italiani che sono a capo di importanti industrie, che hanno fabbriche con centinaia e centinaia di operai, tutti naturalmente italiani; vi sono laggiù migliaia e migliaia di italiani, sia nell'interno, sia nella capitale, che si sono dedicati con felice successo ai commerci, che i nostri prodotti importano in quantità considerevole; ora, se i figli di quegli industriali e di quei commercianti dovessero tutti essere educati e istruiti negli istituti brasiliani e negli stranieri, che avverrebbe tra cinquant'anni della nostra colonia? Quali vantaggi potrebbe ancora ritrarre da essa il nostro Paese?

Non basta. Giova pensare che nello Stato di S. Paulo la nostra colonia è forte di circa ottocentomila italiani, quasi il terzo adunque della popolazione totale dello Stato, e che nella sola capitale gli italiani non sono meno di centomila, quasi la metà della popolazione della città (250.000 mila abit.); giova pensare che la nostra colonia non si trova di fronte a un popolo che possa soverchiarla per numero, per maggior energia di lavoro, a un popolo più forte perché più moderno, com'è – s'io non m'inganno – di altre nostre colonie altrettanto numerose (quali quelle dell'America del Nord), bensì che essa è in un paese nuovo, dove l'elemento indigeno ha fatto in materia d'istruzione rapidi progressi, ma solo in questi ultimi vent'anni, dove, se l'istruzione primaria è stata molto bene ordinata, poco soddisfacente è l'istruzione secondaria: nessun momento anzi migliore di questo, per l'istituzione di una scuola media, oggi in cui il Governo brasiliano, riconosce l'insufficienza del proprio ginnasio.

Giova infine riflettere che fino ad oggi nessuna fusione si può dire avvenuta tra la nostra Colonia e la popolazione indigena, e che per questo nel momento più opportuno per svolgere l'opera che codesto On. Consiglio si è proposta: forse fra qualche anno potrebbe essere troppo tardi.

Della medesima opinione sono anche le persone più notevoli della nostra colonia, a cominciare dai membri del locale Comitato della D.A.¹¹³.

Tutti sono concordi nel riconoscere l'opportunità del progetto ideato da codesto On. Consiglio; tutti affermano che alla Colonia deriveranno grandi vantaggi dalla fondazione di una scuola media italiana; ma non meno unanimi tutti hanno formulato quella che si direbbe la pregiudiziale: purché l'istituzione sia veramente buona, purché la colonia possa compiacersene, possa esserne orgogliosa!

Buona, s'intende, non solo rispetto al valore degli insegnanti, ma anche in ciò che alcuni potrebbero a torto giudicare questione di poco conto, cioè nell'apparenza esterna: buona insomma, in modo da non riuscire di troppo inferiore negli altri Istituti stranieri. Nel caso contrario, meglio non far niente; l'impresa non avrebbe alcuna probabilità di successo, per l'indifferenza e la palese ostilità con cui verrebbe accolta dalla colonia. In una parola: le famiglie italiane che oggi mandano i propri figlioli al «Mackenzie College», all'«Anglo-Brasiliero» ecc., si guarderebbero bene di mandarli all'Istituto italiano, ove questi non fosse, anche rispetto ai locali, tale da poter reggere il confronto con le istituzioni straniere.

¹¹³ V.. alleg. fasc. 4.

Due sono dunque i punti ai quali dobbiamo rivolgere tutta la nostra attenzione: l'ordinamento dell'Istituto e la spesa che importerebbe. ordinamento dell'Istituto.

La scuola media, per rispondere ai bisogni della colonia, deve naturalmente avere annesso un convitto o collegio, e aver sede in un edificio appositamente costruito. Il Collegio è necessario perché le famiglie di una buona parte degli alunni che s'iscriverebbero alla scuola: abitano nell'interno dello Stato; che sia poi indispensabile costruire per il convitto-scuola un edificio, è troppo evidente. Si badi: indispensabile non solo perché l'istituto italiano deve anche in questo essere posto nelle identiche condizioni degli altri collegi brasiliani e stranieri, ma perché non è possibile trovare nella città di S. Paulo un edificio adatto e sufficiente per ospitare un convitto con un buon numero di alunni.

«Dopo un periodo di tre o al massimo di cinque anni, la nuova istituzione – se ben fatta – potrà finanziariamente bastare a sé stessi» tale è l'opinione di tutti coloro che io ho in proposito interpellati. Io non manca allora di apporre un'obiezione a tutti quelli che fin dai primi giorni insistevano per farmi comprendere la necessità di dare all'Istituto un edificio proprio, di apposita costruzione: se la scuola media e il Collegio italiano – dicevo loro – dopo il periodo di tre o cinque anni al più tardi potranno veramente reggersi colle sole proprie forze, o perché non rimandare alla fine di quel periodo la costruzione dell'edificio? Perché non rimanere per quattro o cinque anni in una casa di affitto, col vantaggio di fare un esperimento senza gravi sacrifici finanziari.

Dovetti poco più tardi convincermi io stesso delle gravi difficoltà d'ordine materiale e morale che tolgono ogni valore all'accennata obiezione: d'ordine materiale, perché – ripeto – in S. Paulo, città nuova, mancano edifici convenienti; d'ordine morale perché i nostri connazionali farebbero subito, anche senza volerlo, il confronto con gli altri Istituti e non avrebbero alcuna fiducia nell'opera nostra.

La costruzione però di un edificio richiede circa un anno; e poiché, d'altra parte, deliberata l'istituzione della scuola-convitto, sarebbe per molte ragioni utile iniziare subito l'impresa, per il primo anno, durante i lavori di costruzione, il collegio e la scuola potrebbero essere aperti in una casa in affitto: dato il numero relativamente piccolo di alunni che nei primi 10 e 10 mesi frequenterebbero l'istituto, si può in qualche modo trovare un locale provvisorio, nè la colonia avrebbe alcuna ragione d'essere diffidente quando sapesse e vedesse avviati i lavori per la nuova definitiva sede.

Dell'ordinamento didattico, non è per ora possibile dire con precisa esattezza: la scuola media deve ad ogni modo essere pareggiata alle scuole governative del Regno; questo è l'essenziale; e poiché in generale molte famiglie desiderano far continuare gli studi ai propri figliuoli nelle Università e Istituti superiori italiani, è chiaro che la scuola dovrebbe corrispondere, per la durata dei corsi e pei programmi d'insegnamento, al nostro ginnasio – liceo, con quelle modificazioni che sono inevitabili per le scuole italiane all'estero, di qualsiasi grado esse siano. E cioè, deve essere data molta importanza all'insegnamento della lingua portoghese, della letteratura portoghese e brasiliana, della storia e geografia del Brasile ecc.; e deve del pari esser non meno curato l'insegnamento della lingua francese (che anche si studia nei nostri ginnasi), e di una delle due lingue, tedesca e inglese, a scelta. Oltre al corso medio pareggiato al liceo-ginnasio, l'Istituto dovrà anche aprire un corso tecnico-commerciale, sul tipo non delle nostre scuole tecniche, ma piuttosto su quelle delle scuole commerciali dovute alla recente iniziativa del nostro Ministero di A.I.C., un corso insomma di quattro anni di studio che potrebbero seguire con profitto i giovani che intendono dedicarsi al commercio, entrare in uffici di banche ecc.¹¹⁴.

¹¹⁴ Non sarà meno necessario permettere al corso medio e alla sezione commerciale un corso preparatorio d'istruzione elementare.

Argomento più grave infine è la questione della scelta del personale insegnante: quando l'Istituto avesse una sede degna, la sicurezza del successo, del buon esito, non dipenderebbe che dal valore del corpo insegnante. Sulla questione ricordo di aver richiamato l'attenzione di alcuni on. membri di codesto On. Consiglio Centrale, prima ancora di recarmi a S. Paulo, e ricordo anche di avere esposto nelle sue linee generali un progetto che mi parve, s'io non erro, ottenere la loro adesione¹¹⁵. Oggi, dopo il mio viaggio, ritengo che l'unico modo di provvedere bene alla scelta di una parte degli insegnanti per la scuola-convitto di S. Paulo, sia precisamente quello a cui avevo fin d'allora pensato.

Mandare a S. Paulo dei giovani appena usciti dalle Università, che ancora non hanno dato alcuna prova delle loro attitudini didattiche come insegnanti, e soprattutto della loro serietà, del loro tatto, della loro prudenza, come uomini, e correre un gravissimo rischio. La colonia italiana, numerosa e composta di elementi vari che ancora non sono riusciti a fondersi, è forse una delle più difficili per chi ha un ufficio soggetto al pubblico controllo, qual'è quello dell'insegnante: difficile perché vi abbondano i pettegolezzi, le invidie, le piccole e grandi malignità; perché si pubblicano troppi giornali, alcuni dei quali, non foss'altro che per deficienza di notizie importanti debbono per forza occuparsi di quistioncelle misere e discutere quasi sempre più delle persone che delle cose, come avviene appunto a chi non ha nulla di notevole da dire; difficile, beninteso per chi ha, se non il dovere, certo tutto l'interesse a rimanere estraneo alle contese, alle gare, più o meno piccole fra questi e quelli, fra giornale e giornale, gare e contese, che sono la delizia degli sfaccendati. Un giovane poi appena laureato si trova sempre, nel primo anno soprattutto, un po' a disagio, sulla cattedra; e l'Istituto Italiano ha bisogno invece fin dal primo giorno di avere professori che non solo abbiano già insegnato per qualche anno in Italia, ma che per ingegno, per cultura o per attitudine didattica sappiano superare le non poche difficoltà che s'incontreranno senza dubbio all'inizio dell'impresa, nello svolgimento del programma in una scuola che non può né deve esser perfettamente uguale alle scuole medie italiane; insegnanti che debbano comprendere tutta l'importanza dell'opera che ad essi si richiede, che siano pronti a qualsiasi sacrificio di tempo, a qualsiasi maggior lavoro pur di cooperare col direttore dell'Istituto al felice esito dell'impresa stessa.

Si aggiunge, ripeto, che un giovane che non ha dato prova di sé nell'insegnamento, che è appena uscito dall'Università, non può nemmeno aver dato prova efficace della serietà del proprio carattere. S'immagini il danno che verrebbe all'Istituto, quando uno dei suoi insegnanti, per leggerezza, per inesperienza o per altro, si lasciasse trascinare nelle contese che spesso per questo o quel motivo sorgono nella colonia; se non avesse per esempio la forza di rimanere indifferente o di saper tacere, davanti all'inevitabile e del resto innocua guerricciuola, alla quale l'Istituto sarà certo fatto segno in sul principio da qualcuno dei pseudo-maestri elementari italiani!

D'altra parte, una volta che siano stati assunti come insegnanti persone oggi senza occupazione in Italia, l'Istituto si troverebbe nella quasi impossibilità di licenziarli, ove si rivellessero come inadatti all'ufficio licenziati che fossero questi potrebbero anche rimanere in S. Paulo danneggiando altrimenti la nostra scuola.

Sembrami pertanto che l'unica via da seguirsi sia questa. Codesto On. Consiglio Centrale, tenendo conto che l'Istituto dovrebbe sorgere sotto i suoi auspici e rimanere sempre diretta emanazione della società «D.A.», tenendo conto che dovrebbe esser subito pareggiato alle scuole medie governative, farebbe opera saggia chiedendo che alcuni insegnanti presentemente al servizio dello Stato in quest'ultimo, siano posti a discrezione del Commissariato per l'Emigrazione e del Ministero degli Affari Esteri, e da questi ceduti per un determinato tempo alla «S.D.A.». Nessuna difficoltà amministrativa impedisce che il Ministero

¹¹⁵ Sono i Signori Ernesto Nathan, conte Sanminiatielli e conte Stringher.

della P.I. collochi a disposizione di uno dei due enti governativi sopra citati quattro o cinque insegnanti delle R. Scuole secondarie; nulla vieta poi che questi, dall'uno e dall'altro ente, siano provvisoriamente ceduti alla «D.A.».

Inutile indugiarsi sui considerevoli vantaggi di un simile provvedimento. La scelta, fatta in via privata, può cadere facilmente su insegnanti ottimi, giovani naturalmente, ma già in servizio da cinque o sei anni; i quali, tranquilli sulla sorte della propria carriera, rimanendo cioè nei rispettivi ruoli organici, ben volentieri e con vivo ardore si dedicherebbe all'Istituto di S. Paulo, per un determinato periodo di tempo non inferiore a tre o quattro anni, col diritto da ambo le parti di rinnovare il contratto per un uguale successivo periodo. Che se per avventura uno di essi o non potesse acclimatarsi, o si lasciasse tentare a parteggiare per questo o quel partito della colonia, l'Amministrazione dell'Istituto ne potrebbe sollecitare il richiamo in patria, ove l'insegnante riprenderebbe subito il suo servizio.

Sono convinto, ripeto, che non vi sia, nel provvedimento qui accennato, difficoltà alcuna d'ordine amministrativo: penso anzi che esso può forse esser reso ancor più semplice, chiedendo al Ministro della P.I. che gl'insegnanti (non più di quattro o cinque) siano direttamente messi a disposizione dalla «D.A.», senza il bisogno di passare attraverso ad altro Dicastero, senza il bisogno di alcun Decreto da registrarsi presso la Corte dei Conti, quando la «D.A.» prendesse l'impegno di compensare i supplenti secondo la misura stabilita nella legge dell'aprile 1906.

Prevedo che non mancheranno obiezioni da parte di coloro che sono per abitudine contrari a qualsiasi novità, qualunque si tratti di una novità molto relativa; ad ogni modo mi permetta codesto On. Consiglio Centrale di osservare che se fino a qualche anno fa il Ministero della Guerra non si rifiutava di concedere ad ufficiali in attività di servizio il permesso di recarsi al Congo, per restarvi durante un non breve periodo di tempo al servizio di uno Stato libero, e quindi di un'Amministrazione privata, nulla vi sarebbe di strano nella concessione che l'On. Consiglio dovrebbe a mio avviso sollecitare dal Ministero della P.I., concessione molto più utile alla patria.

Una parte del corpo insegnante, e possibilmente anche i maestri elementari necessari per il corso preparatorio, dovrà invece esser scelto sul luogo stesso. Insegnanti brasiliani, per alcune discipline, non è difficile trovare tra coloro che prestano servizio in altri istituti; e sarà ottimo provvedimento, per ragioni sulle quali è inutile insistere, cercare che l'Istituto Italiano abbia mai più di un professore brasiliano. Se non dobbiamo mirare solo a soddisfare ai bisogni intellettuali della colonia, ma dobbiamo anche il più possibile render simpatico l'istituto nostro alla popolazione indigena, ben lieti se qualche fanciullo brasiliano vorrà frequentare i nostri corsi. Data la presente importanza della colonia, la nostra scuola deve, almeno in piccola parte, avere l'intento che il «Mackenzie College» si è da tempo proposto, cioè far conoscere nello Stato di S. Paulo la nostra cultura scientifica e letteraria.

Quanto ai due o tre maestri elementari di cui l'Istituto avrà bisogno, si potrà vedere se sia il caso di sceglierli in Italia o se convenga provvedere con qualcuno dei pochi buoni che oggi sono in S. Paulo; cosa questa che non mi pare consigliabile, ma di cui non giova ora discutere.

b) Spesa necessaria.

L'Istituto, ho detto, dovrebbe sorgere e rimanere sotto gli auspici della «D.A.». Ma poiché la spesa che si richiede per far cosa decorosa, è assai più considerevole di quella che prima della mia partenza era stata prevista da codesto On. Consiglio Centrale, mi sono studiato di ottenere che la Colonia partecipi all'impresa, concorrendo nella maggior misura possibile a coprire una parte delle spese. I membri più autorevoli della colonia mi hanno formalmente assicurato che, ove si provveda dalla madre patria ai tre quarti circa della somma necessaria, la colonia provvederebbe senza alcun dubbio all'altro quarto.

Cosicché, prevedendosi la spesa totale in circa mezzo milione di lire, la colonia sarebbe pronta a dare per circa centocinquanta mila lire. In questo senso ha rinnovato l'assicurazione uno degli italiani di S. Paulo oggi in Italia (vi rimane fino al dicembre p.v.), l'industriale Sig. Rodolfo Crespi, il quale mi ha dichiarato che si assumerebbe l'impegno di raccogliere la somma accennata fra i 10 e i 12 commercianti e industriali di S. Paulo dai quali ha la certezza di non ricevere un rifiuto.

Naturalmente è bene avvertire che non si tratterebbe di una sottoscrizione a fondo perduto, bensì di una sottoscrizione di azioni: di qui la necessità che codesto On. Consiglio Centrale formi in quel modo che possa sembrar migliore, una società anonima per azioni, coprendo la somma di L. 350 mila, e deferendo poscia l'amministrazione della Società al gruppo degli azionisti residenti in S. Paulo, e al Re Console o ai Membri del locale Comitato della «D.A.», in rappresentanza del gruppo residente in Italia. Tale consiglio d'Amministrazione servirebbe di aiuto e di controllo al direttore per la sola parte amministrativa. Esporre in tutti i suoi minuti particolari nella presente relazione il preventivo di ogni singola spesa, quale io ho calcolato, d'accordo beninteso con tutte quelle persone colle quali mi sono consultate in S. Paulo, parmi fuor di luogo. Quando l'On. Consiglio Centrale credesse opportuno di esaminare il preventivo cifra per cifra e voce per voce, mi farei un dovere di presentarlo alla S.V.

Si tratta ora di risolvere la questione di massima: basterà dunque dire che: 1° – L'acquisto del terreno non può importare meno di lire centomila; 2° – La costruzione dell'edificio richiederebbe circa lire duecentomila; e se si tien conto della spesa di arredamento (mobili, gabinetti scientifici, biblioteca, etc. nella misura dello stretto necessario), della spesa per affitto di un locale durante la costruzione dell'edificio (circa L. Ventimila all'anno;) della spesa così detta d'avviamento per il 1° anno, delle impreviste, e della prudente necessità che una parte del capitale rimanga a disposizione per coprire il deficit che nei primi tre o quattro anni non può non verificarsi, si comprende perché debba occorrere un capitale di circa mezzo milione.

S'intende che io parlo di un istituto, quale la colonia desidera, d'un istituto che possa entro cinque anni al più tardi divenire una non disprezzabile impresa finanziaria.

Conclusione

Ill.mo Signor Presidente

Io non so se avrò avuto la fortuna di ben corrispondere alla fiducia che la S.V. Ill.mo e codesto On. Consiglio Centrale si sono compiaciuti di dimostrarmi; non so se e che cosa l'On. Consiglio vorrà deliberare in merito alle mie proposte: certo è che io ho cercato di fare del mio meglio per studiare con la maggior cura il grave problema, la cui risoluzione è di notevole importanza per l'avvenire della nostra colonia di S. Paulo.

Dato che l'On. Consiglio creda di poter porre mano alla esecuzione del progetto, io dichiaro fin da ora alla S.V. Ill.mo che sono a sua completa disposizione, pronto ad assumere il non facile incarico della istituzione di un collegio e di una scuola media in S. Paulo, non ignaro delle molte difficoltà che dovrei superare, consapevole della grave responsabilità che peserebbe su di me, ma animato da un solo desiderio, quello di riuscire ad ogni costo per fare opera non indegna del nome italiano.

Io od altri, ad ogni modo, ciò non significa nulla. Importa solo una cosa, che la scuola venga istituita per il bene della colonia e a vantaggio del nostro paese.

Grazie alla S.V. Ill.mo e a codesto On. Consiglio Centrale per la missione affidatemi, presente a Lei i miei profondi ossequi.

Roma, 4 Ottobre 1907

Arturo Magnocavallo

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Mario Alighiero Manacorda e la pedagogia marxista nell'Italia del secondo dopoguerra. A proposito di un recente volume

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Mario Alighiero Manacorda and Marxist pedagogy in post-World War II Italy. About a recent volume

ABSTRACT: On the basis of a recent volume by Luca Silvestri, *Una vita onnilaterale: la riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, Unicopli, Milano 2024, the paper aims to retrace the biographical, intellectual and political history of Mario Alighiero Manacorda. In addition, the paper seeks to highlight the significance of the irruption of Manacorda's Marxist pedagogy based on philological and critical studies of the works of Marx, Engels and Gramsci into the school and educational landscape of post-World War II Italy, which is not divorced from a project of transformation in a democratic and egalitarian sense of social reality and an alternative to the theoretical and ideological models then dominant.

EET/TEE KEYWORDS: Mario Alighiero Manacorda; Marxist Pedagogy; PCI; Sport; History of Education; XX Century.

Carmela Covato

Il recente volume di Luca Silvestri, *Una vita onnilaterale: la riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*¹, si configura come la prima rigorosa opera di ricostruzione organica della figura di un grande intellettuale italiano, antifascista e iscritto al PCI dal 1945, che ha dato un contributo decisivo alla battaglia per una scuola democratica e laica e alle sue più significative riforme, a partire dai primi anni del secondo dopoguerra. Nel volume si mette in evidenza, allo stesso tempo, come egli abbia sviluppato una feconda e originale indagine sui problemi educativi di carattere storico e teorico, fondata su una ricostruzione filologica e critica della componente pedagogica presente nel pensiero dei classici del marxismo.

Alcune significative riflessioni storiografiche intorno a questo innovativo percorso pedagogico erano già apparse in un volume collettaneo a cura di Carmela Covato e Chiara Meta², pubblicato nel 2020 con il titolo *Mario Alighiero Manacorda. Un intellettuale militante tra storia, pedagogia e politica*, e, andando più indietro nel tempo, nel volume curato nel 2001 da Angelo Semeraro, *L'educazione dell'uomo completo. Scritti in onore di Mario Alighiero Manacorda*³, una raccolta di scritti che, per l'autorevolezza degli studiosi e delle studiose che vi parteciparono e per l'ampiezza delle tematiche trattate, ebbe il merito di tratteggiare e approfondire, a partire dai temi presenti nelle opere del Manacorda, una molteplicità di questioni educative, storiche e culturali. Il volume raccoglie contributi di Luigi Ambrosoli, Rosanna Basso, Egle Becchi, Bruno Bellerate, Carmen Betti, Giorgio Bini, Dorena Caroli, Paolo Cardoni, Giacomo Cives, Carmela Covato, Giulia Di Bello, Rosella Frasca, Dario Ragazzini, Antonio Santoni Rugiu, Angelo Semeraro e Nicola Siciliani De Cumis. Inoltre, in *Appendice*, Semeraro riporta una lunga intervista fatta

¹ L. Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, Milano, Unicopli, 2024. Nel volume Silvestri raccoglie gli esiti ampliati e approfonditi della sua tesi dottorale discussa nel 2023 nell'ambito del Dottorato di Ricerca dell'Università Roma Tre *Cultura, Educazione, Comunicazione*, coordinato dal prof. Lorenzo Cantatore, suo Tutor.

² C. Covato, C. Meta (edd.), *Mario Alighiero Manacorda. Un intellettuale militante tra storia, pedagogia e politica*, Roma, Roma Tre-Press, 2020. Oltre agli interventi delle curatrici (Carmela Covato e Chiara Meta) il volume raccoglie scritti di Alexander Höbel, Daniele Manacorda, Donatello Santarone, Luca Silvestri e Gregorio Sorgonà. Sul ruolo e lo sviluppo della pedagogia marxista nell'Italia del secondo dopoguerra, cfr. C. Covato, *L'itinerario pedagogico del marxismo italiano*, nuova edizione, Roma, Edizioni Conoscenza, 2022. All'interno del volume, si segnalano i seguenti contributi: R. Sani, *Premessa alla nuova edizione* (pp. 7-12); C. Meta, *Un quarantennio di studi su marxismo e educazione* (pp. 195-220); L. Silvestri, *Momenti della pedagogia marxista nell'Italia repubblicana attraverso le immagini* (pp. 221-274).

³ A. Semeraro (ed.), *L'educazione dell'uomo completo. Scritti in onore di Mario Alighiero Manacorda*, Firenze, La nuova Italia, 2001. Si vedano anche, fra gli altri, F. Cambi, *Libertà da. L'eredità del marxismo pedagogico*, Firenze, La nuova Italia, 1994; e M. Baldacci, *Oltre la subaltermità. Praxis ed educazione in Gramsci*, Roma, Carocci, 2017.

a Manacorda stesso. Essa costituisce una testimonianza autobiografica che si snoda in una preziosa narrazione di eventi esistenziali – dalla storia familiare agli anni della formazione – di vicende e battaglie politiche, di impegni editoriali e culturali, percorsi di ricerca e di studio⁴.

Sia il titolo del volume di Luca Silvestri, *Una vita onnilaterale*, sia quello del precedente volume curato da Angelo Semeraro, *L'educazione dell'uomo completo*, alludono ad una aspirazione, espressa con grande coerenza da Manacorda nelle sue scelte culturali ed esistenziali, che appare radicalmente fondata sul rifiuto di ogni scissione fra mente e corpo, teoria e prassi, ricerca e militanza, oltre che essere fondata sul progetto di un nuovo ordine culturale e sociale al cui interno iscrivere la tematica educativa.

Nell'accingersi ad una ricostruzione della figura dello studioso marxista, Luca Silvestri sottolinea che, oltre all'approfondimento della ricostruzione delle vicende biografiche e dell'impegno intellettuale e storiografico in campo educativo:

[...] un ruolo centrale per ricostruire la pluralità di interessi di Manacorda è stato giocato dall'istituzione del Fondo Manacorda presso il Museo della Scuola e dell'educazione "Mauro Laeng" dell'Università degli Studi "Roma Tre". Il Fondo raccoglie il patrimonio documentario, librario e fotografico di Mario Alighiero Manacorda conservato nelle sue case di Bolsena e di Roma al momento della morte e successivamente donato in più fasi, tra il 2015 e il 2022, dagli eredi al MuSEd del Dipartimento di Scienze della Formazione dell'Università Roma Tre⁵.

Il legame indissolubile fra teoria e prassi esprime non solo un filo interpretativo ed ermeneutico – per altro sempre presente negli studi di Manacorda, come Luca Silvestri espone con grande acume e chiarezza –, ma anche, in definitiva, uno stile di vita, dal modo di fare politica al mondo delle relazioni umane, dal suo impegno di studioso a quello di docente.

È certo che ricostruire la storia di Mario Alighiero Manacorda significa anche ricostruire la storia dell'Italia repubblicana, delle battaglie per l'avvento di una nuova società democratica e, in questo contesto, delle istituzioni culturali del PCI cui Manacorda partecipò intensamente, dalla direzione delle Edizioni di Rinascita e della rivista «Riforma della scuola»; dalla direzione della Sezione Pedagogica dell'Istituto Gramsci a molte altre iniziative politiche ed associative – ad esempio, la direzione dell'ADESPI (Associazione difesa e

⁴ Semeraro (ed.), *L'Intervista*, cit., pp. 295-350.

⁵ Silvestri, *Una vita onnilaterale*, cit., p. 20. L'archivio dei documenti di Manacorda conservato presso il MuSEd, attualmente diretto da Lorenzo Cantatore, è stato riordinato, catalogato e reso accessibile online dalla Ditta Memoria Srl ed è consultabile al seguente indirizzo: <<https://manacorda://archivi.mused.uniroma3.it/oggetti/3-mario-a-lighiero-manacorda?i=4>> (ultimo accesso: 09.12.2024). Per una prima rivisitazione storiografica del Fondo, i contributi già editi sono citati da Silvestri nella *Introduzione* al suo volume, pp. 20-21.

sviluppo della scuola pubblica italiana) – ampiamente trattate nel volume⁶. Si tratta di snodi significativi del suo impegno nello sviluppo della politica scolastica del PCI, prima dell'insorgere degli anni del disincanto e delle grandi delusioni relative alle tante rinunce e ai tanti cedimenti da lui denunciati della cultura politica della sinistra, nei confronti, ad esempio, dell'ideale della laicità da Manacorda sempre strenuamente difeso.

Per Manacorda sono anni difficili all'interno del PCI, tanto da affermare, in una lettera privata destinata all'amico Ignacio Márquez Rodiles "Io per me, dal 1968 avevo definitivamente rotto con l'URSS, e dal 1980 non avevo più rinnovato la tessera del Pci, ma senza dirlo per non portare acqua al mulino degli avversari". Tra i motivi dei contrasti emerge soprattutto la questione della laicità, che Manacorda vede essere seriamente messa in discussione come valore interno al partito quando la maggioranza del PCI dà voto favorevole alla Legge 121 del nuovo Concordato⁷.

Scriva Mario Alighiero Manacorda nella citata *Intervista* curata da Angelo Semeraro:

Il Concordato dell'84 è un tale cumulo di menzogne e di ipocrisie che, in ogni enunciato, soprattutto sulla scuola si presta a tutte le interpretazioni e a tutte le falsificazioni. L'ho dimostrato abbastanza in cento occasioni. Io mi stupisco di come ci possano essere stati giuristi italiani disponibili a sottoscrivere quelle idiozie [...]. E poi il Parlamento ha approvato quel bel Concordato dopo una breve e reticente comunicazione di Craxi. Anche i politici spesso dormono: e non è il peggio⁸.

La prima significativa esperienza di partecipazione politica ad una avventura pedagogica nel Partito comunista, a cui come si è detto si era iscritto all'indomani della liberazione, fu senza dubbio, dal 1946 al 1947, il Convitto per partigiani e reduci "Giaime Pintor", fondato a Roma in stretta collaborazione con Lucio Lombardo Radice, dopo il primo Convitto sorto a Milano⁹.

Lasciata nel 1947 la direzione del Convitto a Lucio Lombardo Radice, Manacorda – scrive Silvestri – si impegna nella politica culturale del PCI attraverso la militanza nell'associazionismo (in particolare nell'ADSN) e la scrittura di articoli per la pubblicistica di partito (dal quotidiano dell'«Unità» alle riviste di «Rinascita» mensile) [...]. Nel frattempo, oltre agli impegni svoltisi negli ambiti dell'associazionismo, della pubblicistica e dell'insegnamento, Manacorda collabora assiduamente alla politica editoriale del PCI, che per volere

⁶ *Ibid.*, pp. 39 e ss. Per un approfondimento della storia della politica scolastica del PCI, cfr. F. Pruneri, *La politica scolastica del Partito Comunista Italiano dalle origini al 1955*, Brescia, La Scuola, 1999 e Sorgonà, *Mario Alighiero Manacorda e la politica culturale del Pci*, in Covato, Meta (edd.), *Mario Alighiero Manacorda. Un intellettuale militante tra storia, pedagogia e politica*, cit., pp. 55-68.

⁷ Silvestri, *Una vita onnilaterale*, cit., p. 131.

⁸ Semeraro (ed.), *L'intervista*, cit., pp. 328-329.

⁹ A questo proposito, oltre alle riflessioni di Luca Silvestri, cfr. A. Höbel, *Mario Alighiero Manacorda e l'esperienza dei convitti Rinascita*, in Covato, Meta (edd.), *Mario Alighiero Manacorda. Un intellettuale militante*, cit., pp. 93-104.

di Togliatti era volta a difendere in nuove e più ampie traduzioni classici del marxismo, fino ad allora scarsamente circolanti in Italia, e, per di più, in edizioni approssimative sul piano scientifico¹⁰.

Luca Silvestri ha avuto così soprattutto il merito, nello scegliere come oggetto di studio e di ricerca l'opera e il percorso di Manacorda, quello di valorizzare il percorso politico e culturale di un grande intellettuale che, a partire dai suoi interessi letterari, sviluppa interessi storici e pedagogici non disgiunti dalla militanza politica nel PCI, e lo fa in un tempo storico, quello odierno, che rischia a volte di marginalizzare figure e temi dell'Italia repubblicana democratica e antifascista.

L'obiettivo dello studio è ampio e innovativo. Pur centrando la sua attenzione sul contributo dato da Mario Alighiero Manacorda – il primo in Italia, negli anni Sessanta, a sviluppare un approccio fondato su un grande rigore filologico e critico – allo studio della componente pedagogica ed educativa presente nel pensiero dei classici del marxismo (Marx, Engels, Labriola e Gramsci), Luca Silvestri non rinuncia a comporre, con gradevole precisione e lungimiranza interpretativa, le tante dimensioni dell'assai articolata scena culturale (dalla letteratura alla storia dal pensiero filosofico, dall'educazione alla storia dell'arte e delle immagini) attraversate negli anni dallo studioso, mettendo in evidenza la fortuna che ebbero in vita le sue opere ma anche l'ampia diffusione, dopo la sua morte, in Italia e all'estero, soprattutto in Brasile, in Inghilterra e in Francia.

Come si cercherà di dimostrare – osserva Silvestri – i testi di Marx, Engels e Gramsci rappresentano il “nucleo ermeneutico” di Manacorda nella misura in cui non sono recepiti in modo dogmatico e “contemplativo” ovvero come “essenze eterne, non alterabili” ma vengono riletti in modo vitale alla luce del presente, pur nei limiti imposti dalla metodologia filologica¹¹.

L'ipotesi, dunque, che Silvestri sviluppa nel volume, consiste nell'evidenziare la presenza dei classici del marxismo in tutti i campi di interessi di Manacorda, a partire dagli studi di pedagogia marxista fino a quelli sulla storia dell'educazione fisica dello sport con riferimento a due volumi pubblicati postumi su questo tema¹².

Ed è anche dallo studio della biblioteca privata, donata dagli eredi al Museo, che è stato possibile esplorare in modo significativo la pluralità di interessi di studio e di ricerca che hanno contrassegnato la vita del grande intellettuale:

¹⁰ Silvestri, *Una vita onnilaterale*, cit., pp. 48-49.

¹¹ *Ibid.*, p. 26.

¹² M.A. Manacorda, *Diana e le muse. Tremila anni di sport nella letteratura*, Vol. 1. In *Grecia e a Roma*, Roma, Lancillotto e Nausica, 2019; Id., *Dal medioevo al Rinascimento*, a cura di Rosella Frasca, Paolo Ogliotti, Aldo Russo, Flavio Silvestrini, Roma, Lancillotto e Nausica, 2019.

[...] chi ha la ventura di esplorare la biblioteca di Manacorda – scrive Silvestri – non può non avere la sensazione di entrare [...] nella visione del mondo dell'autore che ha riunito e assemblato quel patrimonio librario, ovvero in una vera e proprio "biblioteca d'autore". Così come nel dipinto del *Il bibliotecario* di Arcimboldo i libri sono gli elementi costitutivi del volto, del corpo e delle vesti del soggetto ritratto, allo stesso modo i libri della Biblioteca di Manacorda compongono il multiforme e vivido ritratto del loro collezionista¹³.

La ricerca segue alcune traiettorie principali: la pedagogia marxista, la storia sociale dell'educazione, il tema della laicità, la storia dello sport e il rapporto mente-corpo. L'ampia e aggiornata bibliografia primaria e la bibliografia critica sugli studi di Manacorda concludono la ricerca.

L'impegno pedagogico matura, come si è detto, nell'intensa esperienza di politica culturale che prese forma nella direzione dell'Edizioni Rinascita e nella direzione della rivista «Riforma della scuola», al cui interno maturò in modo più radicale l'impegno verso il mondo della scuola insieme a grandi studiosi come Lucio Lombardo Radice, Dina Bertoni Jovine, Carlo Bernardini e Tullio De Mauro e tanti altri. In questo contesto, una particolare attenzione è dedicata al ruolo svolto da Manacorda nella elaborazione del disegno di legge Donini-Luporini presentato dal PCI nel 1959 per l'istituzione della scuola media unica, una delle riforme scolastiche più importanti nella storia dell'Italia repubblicana, che vide poi la luce, sul piano normativo, nel 1962.

È proprio a partire da un impegno concreto nell'ambito di iniziative connesse al rinnovamento della scuola in senso democratico che matura l'esigenza e l'urgenza dell'elaborazione di un approccio inedito nel panorama pedagogico italiano del secondo dopoguerra: la teorizzazione di una pedagogia marxista, come nucleo tematico a cui gli studiosi – scrive Silvestri – hanno fatto riferimento anche dopo la sua scomparsa, non solo in Italia, ma anche in campo internazionale (Messico, Brasile, mondo anglosassone).

Nell'un caso e nell'altro – la politica scolastica e l'impegno teorico – colpisce il richiamo alla dimensione onnilaterale, sulla scia del pensiero di Karl Marx, e all'unitarietà di un progetto di formazione possibile solo laddove si sia pervenuti storicamente al superamento di ogni forma di divisione fra le classi della scissione fra attività manuali e attività intellettuali, storicamente destinate ad individui diversi; fra teoria e prassi; al di là di ogni forma di alienazione che colpisce sia l'operaio sia l'imprenditore, entrambi sussunti in modo diverso alla dittatura del profitto e del capitale.

Alla luce di queste considerazioni, emerge con evidenza come a Manacorda, a partire dagli anni Sessanta, sia apparso inevitabile collegare la militanza politica ad una ricostruzione filologica e teorica delle componenti pedagogiche presenti nel marxismo.

¹³ L. Silvestri, *La biblioteca di Mario Alighiero Manacorda. Un ritratto attraverso i libri*, in E. De Pasquale, P. Storari (edd.), *Libri esemplari. Le biblioteche d'autore a Roma Tre*, Roma, Roma Tre-Press, 2022, p. 84.

A partire da questo percorso gli è stato possibile collocare coerentemente la questione educativa all'interno di un processo di trasformazione della vita sociale, di superamento di ogni forma di disuguaglianza e di sfruttamento dell'uomo sull'uomo. Senza questa prospettiva, ogni progetto pedagogico finirebbe con l'essere illusorio, ideologico e riduttivamente autoreferenziale. Da questo punto di vista, le opere di Manacorda testimoniano, nel loro insieme, la grande coerenza teorica del suo impegno intellettuale e del suo progetto storiografico. In questo contesto, il concetto di formazione onnilaterale assume una indubbia centralità. Scrive Silvestri:

Rispetto a questa questione relativa alle caratteristiche specifiche della pedagogia marxiana, Manacorda sostiene che nelle opere di Marx e Engels è possibile non solamente rintracciare varie questioni pedagogiche (come, ad esempio, il problema del lavoro infantile; il rapporto della scuola con lo Stato, il governo e la Chiesa; il contenuto dell'insegnamento scolastico; l'istanza di universalità e gratuità dell'istruzione), ma anche un più vasto principio pedagogico che le connette tutte insieme. Tale principio può essere formulato schematicamente come segue: l'associazione tra istruzione scolastica e lavoro produttivo di fabbrica, al fine di creare l'uomo "onnilaterale" (in tedesco *allseitig*), che è pienamente sviluppato (in tedesco total *entwickelt*) sia in termini di capacità intellettuali (grazie all'istruzione scolastica) sia in termini di capacità produttive (grazie al lavoro in fabbrica). Secondo Manacorda, Marx e Engels oppongono questo progetto pedagogico ai nefasti effetti causati dalla divisione del lavoro e dalla relativa divisione dell'educazione tra classi dominanti, alle quali spetta l'istruzione scolastica, e classi subalterne, alle quali spetta l'apprendistato in fabbrica. Tali effetti possono essere sintetizzati come "l'unilaterale", ovvero parziale, sviluppo delle capacità degli esseri umani di ogni classe sociale¹⁴.

Sono davvero molti i temi affrontati da Manacorda in questo complesso e lungo percorso di ricerca che Silvestri ha il merito di indagare, ricostruendone le diverse fasi, caratterizzate dal procedere per tappe, per interrogativi che via via lo studioso si è posto nel tempo, per le risposte costruite superando dubbi, incertezze interpretative, quesiti e soluzioni.

Si pensi alla differenza fra istruzione tecnologica e politecnica come alternativa agli effetti divisione del lavoro; una questione a cui vengono date da Marx ed Engels risposte diverse.

La prima, quella tecnologica, sostenuta da Marx come formazione unitaria finalizzata alla conquista della capacità di conoscere e padroneggiare l'intero sistema produttivo; l'altra, quella politecnica, proposta da Engels, ma ritenuta da Marx, tuttavia, troppo legata ad una idea di versatilità funzionale al mercato e alle sue diverse esigenze¹⁵.

In sintesi, nel *Capitale* Marx scorge come necessità per lo stesso sistema di produzione il cambiamento dell'intero sistema educativo tradizionale e dell'ideale pedagogico ad essa connesso. Secondo Manacorda, Marx, legando la pedagogia all'analisi della realtà socio-

¹⁴ Silvestri, *Una vita onnilaterale*, cit., pp. 65-66.

¹⁵ *Ibid.*, pp. 66 e ss.

economica (e quindi non solo ad esigenze volontaristiche di tipo morale), oltre ad evitare di produrre una pedagogia volontaristica di tipo morale come quella di Owen, delinea – contrariamente a quanto sostenuto da Armando Plebe – una pedagogia perfettamente coerente ai principi “anti-ideologici” del marxismo¹⁶.

Nel contesto di questo tipo di ricerca, niente è scontato in partenza. Gli esiti conoscitivi sono il risultato di un percorso, di tappe diverse di un procedere euristico sempre problematico e mai assertivo e definitivo.

Così come non fu scontato in partenza, per Gramsci pervenire all'ipotesi di una scuola unitaria attiva e creativa fondata sul rapporto fra istruzione e lavoro e, soprattutto, destinata a tutti, superando ogni visione della scuola come sistema scolastico iscritto nella Riforma Gentile. Né fu scontata in partenza la risoluzione di un dubbio che ebbe Gramsci nei confronti dello spontaneismo pedagogico. Questi, infatti, passa da iniziali posizioni antiautoritarie e puerocentriche, che richiamano echi delle posizioni delle teorie di Rousseau e, per altri versi, di Giuseppe Lombardo Radice, ad una radicale critica dello spontaneismo rousseauiano¹⁷.

Questo modo di concepire l'educazione come sgomitamento di un filo preesistente ha avuto la sua importanza quando si contrapponeva alla scuola gesuitica, cioè quando negava una filosofia ancora peggiore, ma oggi è altrettanto superata. Rinunciare a formare il bambino significa solo permettere che la sua personalità si sviluppi accogliendo caoticamente dall'ambiente generale tutti i motivi di vita. È strano e interessante che la psicoanalisi di Freud stia creando specialmente in Germania (a quanto mi pare dalle riviste che leggo) tendenze simili a quelle che esistevano in Francia neo Settecento; e vada formando un nuovo tipo di ‘buon selvaggio’ corrotto dalla società, cioè dalla storia. La spontaneità è una di queste involuzioni: si immagina che nel bambino il cervello sia come un gomitolino che il maestro aiuta a sgomitare. In realtà ogni generazione educa la nuova generazione, cioè la forma [...] al fine di creare l'uomo attuale alla sua epoca¹⁸.

La seconda dimensione tematica presente nel volume di Silvestri consente un affondo sul contributo dato da Manacorda allo sviluppo della storia sociale dell'educazione, alternativa ad una storia della pedagogia a lungo risolta esclusivamente nella storia delle idee pedagogiche, aperta alle contraddizioni della vita sociale, in un'indagine che si svolge a partire dall'antichità classica, e arricchita dalla scoperta dell'importanza delle fonti iconografiche, di cui Manacorda è stato pionieristicamente protagonista e interprete.

A questo proposito, non era stato assolutamente indifferente l'esempio del padre, Giuseppe Manacorda, e più specificamente la sua lezione storiografica sintetizzata in *La Storia della scuola in Italia. Il medioevo*¹⁹, nella quale si ri-

¹⁶ *Ibid.*, p. 68.

¹⁷ A. Gramsci, *L'alternativa pedagogica*, antologia a cura di M.A. Manacorda, Roma, Editori Riuniti University press, 2012.

¹⁸ *Ibid.*, pp. 201-202.

¹⁹ G. Manacorda, *La storia della scuola in Italia, Il medioevo*, 2 tomi, *Presentazione* di E.

vela anticipatore di una storia della scuola fondata sulla materialità educativa e non solo su una astratta storia delle idee.

Si tratta di un'opera alla quale Mario Alighiero tenne particolarmente, tanto da impegnarsi, assieme al fratello Gastone e all'amico Eugenio Garin, nella sua ripubblicazione nel 1980.

Rispetto alla storia sociale dell'educazione, l'opera di Giuseppe Manacorda, pur non potendo essere considerata come un'anticipazione della lezione storiografica delle *Annales* e della nuova storia, si caratterizza per alcuni elementi particolarmente innovativi per l'epoca e che torneranno anche nella riflessione storiografica di Mario Alighiero Manacorda: il metodo e l'attenzione alla materialità educativa non confinabile nella storia delle idee.

E, come è stato più volte detto – scrive Silvestri – Il cambiamento di temi della ricerca storica comporta con sé anche la ricerca di nuove fonti. Sarà questa stessa esigenza di passare dalla storia delle idee alla storia sociale dell'educazione a spingere Manacorda ad interessarsi alle fonti iconografiche, arrivando a realizzare la *Storia illustrata dell'educazione* nel 1992. Con quest'opera, per la prima volta nel panorama italiano, il racconto della storia dell'educazione non si fonda più prevalentemente sul testo ma sulle immagini²⁰.

La terza sezione tematica del volume affronta due aspetti centrali nell'itinerario politico e intellettuale di Manacorda: da una parte il tema della laicità come stella polare del superamento di forme di pensiero arcaiche e di etiche fondate su visioni confessionali e retrograde della vita associata e, dall'altra, un aspetto davvero innovativo dell'impegno scientifico di Manacorda. Si tratta del lavoro di ricerca svolto negli ultimi anni della sua vita e dedicato alla storia dell'evoluzione dello sport nel corso di tremila anni, di una storia intesa come ricostruzione critica, sulla base di fonti filosofiche, letterarie e artistiche, del progressivo affermarsi nella cultura occidentale di una discutibile scissione fra mente e corpo. Dei due volumi *Diana e le Muse. Tremila anni di sport nella letteratura* pubblicati postumi si è già accennato precedentemente.

La ricostruzione della vasta bibliografia relativa alle opere di Manacorda, arricchita da alcune interviste da lui rilasciate e dall'assai consistente saggistica critica sviluppatasi sul suo pensiero rappresenta la parte conclusiva del volume.

Luca Silvestri ci offre così un saggio di grande spessore storico, teorico e biografico contribuendo, con competenza tematica ed empatia conoscitiva, alla storia della "vita onnilaterale" di un intellettuale il cui contributo politico-educativo e politico-culturale conserva una grande attualità interpretativa e pedagogica, a testimonianza della necessità di costruire, ancora oggi, un'al-

Garin, Firenze, Le lettere, 1980.

²⁰ M.A. Manacorda, *Storia illustrata dell'educazione. Dall'antico Egitto ai giorni nostri*, Firenze, Giunti, 1992.

ternativa pedagogica, come Manacorda stesso ebbe a definire il pensiero di Antonio Gramsci.

Albertina Vittoria

Mario Alighiero Manacorda era una persona umanamente molto sensibile, un personaggio sui generis, non conformista e sempre pronto a dire la propria. Uno studioso profondamente laico e non sottomesso all'ideologia, come il libro di Luca Silvestri ha il merito di dimostrare²¹.

La sua figura ha avuto una grandissima importanza nel campo degli studi pedagogici. In particolare, con la sua *Storia dell'educazione dall'antichità a oggi* (1983), come scrive Silvestri, Manacorda divenne uno dei protagonisti della battaglia storiografica che produsse in Italia tra la fine degli anni Settanta e gli anni Ottanta «uno spostamento di paradigma da storia della pedagogia a storia sociale dell'educazione» (p. 85).

Il libro di Luca Silvestri, frutto della tesi di dottorato, è concentrato sugli studi sulla pedagogia, con l'obiettivo di evidenziare la presenza dei classici marxisti nei campi di interesse di Manacorda. Il fatto che mi sembra di grande importanza è come in Manacorda i testi di Marx, di Engels e di Gramsci non fossero «recepiti in modo dogmatico e 'contemplativo'» (p. 26). Lo ha sottolineato Carmela Covato in un suo studio, affermando che con Manacorda, a partire dal fondamentale *Marx e la pedagogia moderna* (1966), ci fu un salto di qualità, grazie al suo «tentativo di superare le generalizzazioni ideologiche» attraverso «uno studio analitico e filologicamente fondato degli scritti di Marx e Engels»²². La lettura teorico-filologica costituì quindi il tratto distintivo dei suoi studi pedagogici, sia per le opere di Marx e di Engels, sia per quelle di Gramsci, come Silvestri evidenzia nel corso della sua ricerca. È un dato di grande importanza, che mostra quanto gli studiosi marxisti e gramsciani italiani, che facevano capo al PCI, avessero recepito la necessità di andare oltre le certezze dogmatiche e di partire sempre dalle analisi dei testi e dalla filologia. Peraltro, il fratello Gastone, nella prima metà degli anni Cinquanta, lo aveva sostenuto in campo storiografico, scontrandosi con le componenti più ortodosse e ždanoviane del suo partito²³.

²¹ Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, cit. (le pagine delle citazioni da questo volume saranno indicate direttamente nel testo).

²² C. Covato, *Un'ipotesi marxista sull'educazione: M.A. Manacorda*, in Ead., *L'itinerario pedagogico del marxismo italiano. Nuova edizione*, Roma, Edizioni Conoscenza, 2022, pp. 73-95, pp. 75-76 (in Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, cit., pp. 27-28).

²³ Cfr. G. Manacorda, *Intervento alla discussione dell'Istituto Gramsci sulla storiografia*

Giustamente Silvestri avvia la propria indagine dalla storia della famiglia e della formazione familiare.

È una storia molto triste. Il padre, Giuseppe, italianista, era stato allievo della Scuola normale superiore di Pisa, aveva insegnato al liceo romano Visconti e quindi ottenuto la libera docenza all'Università di Roma: tra i suoi studi la *Storia della scuola in Italia*, Vol. I, *Il Medio Evo*, edito da Sandron nel 1914 e i saggi raccolti negli *Studi foscoliani*, usciti postumi da Laterza nel 1921. Convinto pacifista e antiinterventista, di sentimenti antifascisti, morì di spagnola nel 1920. La madre, Lina Romagnoli, dopo la morte del marito, riprese l'insegnamento nei licei, dovendo andare avanti con 6 figli.

Il fratello minore, Paolo Emilio, era un italianista ed era entrato in contatto nella Facoltà romana di Lettere con alcuni giovani che avrebbero avviato la propria attività antifascista alla fine degli anni Trenta, alcuni dei quali sarebbero divenuti comunisti; fu lui a fare da tramite tra questo gruppo e il fratello Gastone, che si era laureato in Legge. Vita segnata da un tragico destino, poiché, inviato al fronte in Jugoslavia, Paolo Emilio morì il 25 febbraio 1942, ucciso da quei partigiani nelle cui fila stava cercando di passare. Poco dopo morì la madre. Ricordo gli incontri con Mario Alighiero e la moglie di Gastone, Marcella, e come lui si commuovesse quando ricordava questi tragici eventi²⁴.

Furono grandi dolori che per Mario Alighiero ebbero effetti devastanti. Un appunto in un documento del 2011 dell'archivio di Manacorda lo rivela: «Stamattina all'improvviso mi sono reso conto che nel 1943, tornati a Roma da Siena, dopo 'l'armistizio' (e la morte di Paolo e della mamma) io sono 'entrato in depressione', alla lettera. [...] Ne sono venuto fuori a poco a poco studiando Marx e il 1848 francese alla Biblioteca di storia moderna: lavoro poi perduto andando in bicicletta» (p. 42).

Silvestri sottolinea a ragione quanto sia stata importante per Manacorda la figura del padre, come egli stesso ricordò nell'intervista ad Angelo Semeraro: «non è che i miei primi cinque anni 'con lui' siano passati senza lasciare traccia [...]. Sì: ho percorso in qualche modo le vie di mio padre, forse assomigliandogli molto anche nel carattere»²⁵.

Nel 1980 Gastone e Mario Alighiero ripubblicarono per la casa editrice Le Lettere la *Storia della scuola in Italia*, con presentazione di Eugenio Garin, nota biografica di Mario Alighiero, elenco degli scritti a cura di Gastone.

marxista (10 dicembre 1954), nel fascicolo monografico di «Studi Storici», a. XLIV, n. 3-4, 2003, dedicato a *Gastone Manacorda: storia e politica*, pp. 1016-1025.

²⁴ Sui commossi ricordi di Mario Alighiero mi sono basata per la ricostruzione delle vicende familiari nel mio *Per un profilo di Gastone Manacorda*, «Studi Storici», a. XLII, 2001, n. 1, pp. 9-24.

²⁵ *L'intervista*, a cura di A. Semeraro, in Id. (ed.), *L'educazione dell'uomo completo. Scritti in onore di Mario Alighiero Manacorda*, Scandicci (Firenze), La Nuova Italia, 2001, pp. 296-297 (in Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, cit., p. 31).

Silvestri mette in relazione l'approdo di Mario Alighiero alla storia sociale dell'educazione, oltre ad altri diversi fattori, proprio con la riedizione del libro del padre, che aveva inteso ricostruire la storia della scuola nel suo contesto sociale, culturale e legislativo.

Non essendo esperta di pensiero pedagogico, in queste pagine vorrei soffermarmi su altri aspetti di carattere più politico della biografia di Mario Alighiero Manacorda.

In primo luogo, bisogna sottolineare il fatto che Manacorda ha seguito un percorso simile a quello di altri giovani intellettuali antifascisti, divenuti comunisti fra la fine degli anni Trenta e la Resistenza, che dopo la guerra abbandonarono i propri interessi originari per dedicarsi all'attività politica. Manacorda era un letterato, come ha ripetuto in più occasioni, aveva studiato letteratura moderna alla Scuola Normale di Pisa e si era laureato con Luigi Russo con una tesi su Ugo Foscolo (non a caso un autore studiato dal padre). Una borsa di studio in Germania gli permise di studiare il tedesco, aprendo così la strada alla sua attività di traduttore di Marx ed Engels per le Edizioni Rinascita e poi per gli Editori Riuniti, e di altro ancora.

Nel 1939 vinse la cattedra di letteratura italiana e latino al liceo classico di Siena e alla fine di quell'anno sposò Annamaria Bernardini.

Per quanto amico di antifascisti e per quanto il fratello Gastone fosse già impegnato nell'antifascismo militante e nella Resistenza a Roma, Mario Alighiero non partecipò all'attività clandestina poiché stava male, come si è detto. Dalla depressione uscì studiando Marx e lavorando alla sua prima traduzione, in questo caso dal francese: la vita di Marx di Auguste Cornu in tre volumi, editi dalla Nuova biblioteca di Milano nel 1945-1946.

Finita la guerra Mario Alighiero non si iscrisse al PCI, mentre sua moglie e Gastone sì. Lo fece dopo aver assistito al V congresso del partito che si svolse a Roma negli ultimi giorni del dicembre 1945 e i primi del gennaio 1946. Fu una scelta, come mette in evidenza Silvestri, che produsse «una cesura cruciale per la sua vita e per il suo approdo alla pedagogia marxista». Quella scelta infatti comportò «la sofferta rinuncia al mondo della letteratura» (p. 43).

È interessante il fatto che nell'intervista a Semeraro Manacorda affermasse che «solo un maledetto moralismo ha fatto di me un militante politico»²⁶. Un moralismo – che lui definiva addirittura «maledetto» –, che appartenne a molti della sua generazione: all'indomani della Liberazione, l'impegno nella clandestinità e nella Resistenza doveva continuare, non poteva essere abbandonato perché ora bisognava pensare a ricostruire il paese.

A Manacorda l'impegno che venne chiesto da parte dei dirigenti comunisti, oltre a quello nell'attività editoriale, fu nell'ambito della politica scolastica, con tutto ciò che ha comportato e che in questo volume è ben ricostruito. La

²⁶ *L'intervista*, p. 325 (in Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, cit., p. 44).

sua attività si svolse in diversi settori, quello giornalistico con la collaborazione all'«Unità» e a «Rinascita», quello organizzativo nell'Associazione per la difesa della scuola e nell'Istituto Gramsci, dove a metà degli anni Cinquanta, quando responsabile della commissione culturale era divenuto Mario Alicata, fu avviato sotto la direzione di Alessandro Natta un lavoro di studio e di proposta per la riforma della scuola. Ci fu poi dal 1964 al 1984 la direzione della rivista «Riforma della scuola». Insomma, un impegno a tempo pieno, che fu accompagnato dagli anni Sessanta dallo studio teorico dei classici del marxismo e di Gramsci sull'educazione. Anzi come scrive Silvestri fu proprio la militanza attiva nel settore scolastico a fargli maturare la necessità di passare allo studio dei classici del marxismo sull'educazione

La sua collaborazione con l'Istituto Gramsci fu costante e si intensificò da quando nel 1976 fu ricostituita la sezione per i problemi dell'educazione. In proposito, al convegno dedicato a Franco Ferri e alla sua direzione dell'istituto, nel suo intervento Manacorda ricordò quanto era stato importante il sostegno di Ferri per l'elaborazione e la diffusione di idee nel campo pedagogico, attraverso una vasta attività di corsi e seminari, seguiti da centinaia di persone. Ancor più importante lo fu per Manacorda stesso dato che lui – ribadiva – si trovava «forzato (è la parola giusta) dal partito a occuparmi di scuola e di pedagogia (cose per le quali non ero nato) e ridotto perciò ai margini della ricerca storico-letteraria e filosofica»²⁷. Mi domando quanto ci fosse di rimpianto in questo suo insistere sulla questione.

Proprio per questo credo che il rapporto con il PCI e la sua esperienza politica siano stati fondamentali. Alcuni eventi lo condizionarono significativamente.

Ad esempio quelli relativi all'Unione Sovietica. Nel '56 dopo il XX Congresso e dopo l'invasione sovietica dell'Ungheria, egli non prese posizione, contrariamente al fratello Gastone, che dissentì ma non uscì dal PCI. In occasione di una riunione della commissione culturale comunista del luglio 1956, precedente quindi all'invasione, Mario Alighiero parlò del rapporto segreto affermando che «le cose dette da Chruščëv le sapevamo ma non le abbiamo volute ricercare»²⁸. In una riflessione successiva, l'articolo *Perché non posso non dirmi comunista*, pubblicato su «l'Unità» nell'89, ricordò un episodio simile a proposito di una relazione di Celeste Negarville a una riunione (probabilmente

²⁷ M.A. Manacorda, intervento in *Il «lavoro culturale». Franco Ferri direttore della Biblioteca Feltrinelli e dell'Istituto Gramsci*, a cura di F. Lussana, A. Vittoria, Roma, Carocci, 2000, pp. 341-346, in partic. p. 342.

²⁸ Fondazione Gramsci, *Archivio del Partito comunista italiano*, Partito, *Commissione culturale*, 1956, riunione del 23-24 luglio, intervento di M.A. Manacorda. Per gli interventi di Gastone Manacorda a questa riunione e a quella del 15-16 novembre 1956, successiva all'invasione dell'Ungheria, cfr. A. Vittoria, *Togliatti e gli intellettuali. La politica culturale dei comunisti italiani (1944-1964)*, Roma, Carocci, 2014, pp. 205, 229-232; gli interventi del novembre 1956 sono riportati integralmente in *Gastone Manacorda: storia e politica*, cit., pp. 1026-1038.

quella della commissione culturale di luglio nella quale ci fu un lungo intervento di Negarville) in cui questi aveva affermato di non essere al corrente della «degenerazione» staliniana. A queste affermazioni Manacorda, l'unico tra i presenti, «solo, come un bambino sporcacasa», rispose convintamente: «no, io avevo saputo tutto da sempre, essendo stato educato in una società clericofascista sulla lettura di Koestler, di Trockij, del *Bolscevismo* di Guido Manacorda [fratello di Giuseppe Manacorda] e dei pochi altri testi che il fascismo ci consentiva». Tuttavia, aveva scelto di rimanere dalla parte del comunismo perché, scriveva, «la bilancia dei mali del mondo continuava a pendere verso l'altra parte, mentre da questa parte restava la speranza di una prospettiva nuova»²⁹. Mi sembra importante sottolineare queste affermazioni, non solo per il legame con l'URSS che era comunque giustificato in nome dell'anticapitalismo; ma anche per i riferimenti di Manacorda a quei testi anticomunisti e antisovietici che il regime faceva circolare senza però ottenere – per lo meno in giovani come lui – l'effetto sperato.

Con l'Unione Sovietica invece ruppe nel 1968, dopo l'invasione della Cecoslovacchia da parte delle truppe del Patto di Varsavia. Si direbbe – come suggerisce Silvestri – che le sue posizioni fossero maturate già negli anni precedenti e che egli fosse concorde con gli interventi di Togliatti, in particolare con il *Memoriale di Jalta* in cui il segretario comunista aveva affermato che non era «giusto parlare dei paesi socialisti (e anche dell'Unione Sovietica) come se in essi tutte le cose andassero sempre bene»³⁰. In questa direzione sembra infatti andare un brano del III volume di *Marx e l'educazione* del 1966, citato da Silvestri:

Oggi, del resto, il significato non solo di 'socialismo', ma anche di 'marxismo' non è più né univoco né incontestabile. Sconfessioni e rotture, anche di tale gravità da apparire inconciliabili, o adesioni caute e parziali rendono il quadro più vario e più fluido, escludendo ormai ogni ipotesi di ortodossia in un campo socialista caratterizzato dalla ipotesi togliattiana di una 'unità nella diversità', se non proprio dall'esistenza di forze centrifughe o addirittura contrastanti (p. 62).

Silvestri ricorda come gli anni Ottanta furono per Manacorda difficili nel PCI, soprattutto per via della questione della laicità, che egli riteneva essere stata messa in discussione quando la maggioranza del suo partito aveva dato voto favorevole alla Legge n. 121 del 1985 del nuovo Concordato. Ne è una

²⁹ M.A. Manacorda, *Perché non posso non dirti comunista* («l'Unità», 19 giugno 1988), in Id., *Perché non possiamo non dirti comunisti*, Roma, Editori Riuniti, 1997, pp. 11-15, pp. 13-14. Cfr. G. Sorgonà, *Mario Alighiero Manacorda e la politica culturale del Pci*, in *Mario Alighiero Manacorda. Un intellettuale militante tra storia, pedagogia e politica*, a cura di C. Covato, C. Meta, Roma, RomaTre Press, 2020, pp. 55-67, pp. 64-65.

³⁰ Il *Memoriale di Jalta*, *Promemoria sulle questioni del movimento operaio internazionale e della sua unità*, è in P. Togliatti, *Opere scelte*, a cura di G. Santomassimo, Roma, Editori Riuniti, 1974, pp. 1170-1181.

testimonianza importante una lettera privata destinata agli amici brasiliani Nacho (Ignacio) e Naya Márquez Rodiles del settembre 1991: «Io per me, dal 1968 avevo definitivamente rotto con l'URSS, e dal 1980 non avevo più rinnovato la tessera del Pci, ma senza dirlo, per non portare acqua al mulino degli avversari» (p. 131).

Ugualmente Manacorda non seguì il PCI all'indomani dell'89, non perché volesse difendere l'URSS essendo ormai convinto del «fallimento del socialismo reale», come scriveva nella medesima lettera³¹. Lo aveva affermato già in un'intervista quando uscì il volume *Perché non possiamo non dirci comunisti*: la caduta del muro di Berlino non significava la caduta del comunismo ma del socialismo reale. «La crisi del socialismo reale non ha niente a che fare con la rinuncia alle speranze in un mondo migliore». Il pensiero di Marx e quello di Gramsci non erano da rinnegare, anzi quei protagonisti valevano come «grandi classici»³².

Il problema riguardava quello che a suo avviso era derivato dalla fine del PCI. Ancora la lettera a Ignacio Márquez Rodiles del 1991 spiega i suoi sentimenti:

la nostra battaglia, la nostra stessa vita sono ormai nella storia, e lasceremo ai posteri il giudizio. Io mi sento, anzi, un postero di me stesso (senza alcun rimpianto, con molta serenità) e guardo a me stesso come guardo a qualche intellettuale ottocentesco di sinistra, la cui vita e opera è ormai là, e basta. Il giudizio sulla sua persona è ormai storico e non politico. Così non so più militare in alcuno schieramento di partito: non certo il confusionario PDS, celebratore della gloria della socialdemocrazia capitalistica (mi vanno bene tutte le posizioni avanzate, ma non posso davvero identificarmi); non Rifondazione comunista, dove sono insieme vecchi stalinisti e vecchi antistalinisti e che non si sa ancora che cosa sarà; non i tanti gruppuscoli ancora esistenti a sinistra [...]. Ma sono disponibile alle lotte politiche concrete: in particolare a una battaglia laica che io stesso ho promosso, e di cui tuttavia non voglio farmi un feticcio. Ma oggi nessun partito italiano ha il coraggio di combatterla, e d'altra parte io sono convinto che la laicità, cioè il rifiuto di ogni autorità super-umana sulle coscienze, e la convivenza pacifica tra le diverse ideologie (ma io preferisco una convivenza 'agnostica', cioè una battaglia ideale aperta, senza sostegni dello stato a nessuno), sia una premessa fondamentale di ogni sistema di libertà, democrazia, uguaglianza³³.

Libertà, democrazia, uguaglianza che rappresentarono per Mario Alighiero Manacorda un faro in tutta la sua lunga vita.

³¹ La lettera, datata erroneamente 8 settembre 1989, mentre dai riferimenti è chiaro che si tratta del 1991, è riportata integralmente in *Mario Alighiero Manacorda. Un intellettuale militante tra storia, pedagogia e politica*, cit., pp. 177-179, in partic. p. 178.

³² Intervista sul libro *Perché non possiamo non dirci comunisti*, cit., «Liberazione», 2 luglio 1997.

³³ Lettera a Nacho (Ignacio) e Naya Márquez Rodiles, cit., p. 179, e in Silvestri, *Una vita onnilaterale. La riflessione pedagogica di Mario Alighiero Manacorda (1914-2013)*, cit., p. 132.

Pedagogical artifacts and transnational flows: an economic history of education*

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ABSTRACT: The book *História econômica da escola: Uma abordagem antropológica em circuito transnacional (1870-1910)*, by Diana Vidal and Wiara Alcântara, explores the economic dimension of school material culture. It examines the transnational circulation of pedagogical artifacts, such as books and wall paintings, between 1870 and 1910. Using an interdisciplinary approach – economic history, material anthropology, and transnational history – the authors analyze the impact of monopolies and local markets on school practices and educational policies, integrating school objects into broader cultural and economic flows.

EET/TEE KEYWORDS: School material culture; Economic history of education; Transnational circulation; Anthropology of education; XIX-XX Centuries.

História econômica da escola: Uma abordagem antropológica em circuito transnacional (1870-1910) [*Economic history of the school: An anthropological approach in a transnational circuit (1870-1910)*] is a work resulting from the research of Diana Gonçalves Vidal and Wiara Rosa Alcântara, published by the publisher of the State University of São Paulo (Unesp), Brazil, in the year 2024, the volume is part of the *Dialogues in History of Education*, Collection of the *Brazilian Society of History of Education* [*Sociedade Brasileira de História da Educação*]¹. The book addresses a perspective still little explored in the history of education: the economic dimension of school material culture. By investigating the interconnections between pedagogical artifacts and economic processes, the work expands the traditional scope of analy-

* This article is part of a research project that seeks to identify, catalogue and analyze the Italian textbooks that circulated in Italian schools in the South American context of the countries of Brazil and Argentina during the 20 years of fascist rule. This research was supported by The São Paulo research foundation (*Fundação de Amparo à Pesquisa do Estado de São Paulo – FAPESP* n. 2023/16884-7 and FAPESP n. 2022/15183-2).

¹ SBHE website: <<https://sbhe.org.br/>> (last access: 13.03.2025).

sis, highlighting how school materiality is intrinsically linked to the dynamics of production, circulation and consumption in local and transnational contexts. Diana Vidal is a senior professor at the University of São Paulo (USP), with extensive experience in the history of education and school material culture, Wiara Alcântara is a professor at the Federal University of ABC Paulista (UFABC), dedicating her research to the study of school material culture. Together, their contributions have significantly expanded the theoretical and methodological horizons in the field of the history of education on the theme that involves the circulation of objects, ideas and subjects. Thus, this book is the result of 29 years of research, in 1995 the project began: *The school in its materiality: strategies and tactics (Distrito Federal, 1927-1930)*², currently this field of research continues with the thematic project: *Knowledge and practices in borders: for a transnational history of education (1810-...)*³, both projects led by Professor Diana Vidal and with funding from the São Paulo Research Foundation (*Fundação de Amparo à Pesquisa do Estado de São Paulo – FAPESP*), Brazil.

Rosa Fátima de Souza Chaloba, full professor at the University of the State of São Paulo (Unesp), when prefacing the work, summarizes its meaning in the following paragraph:

It is, at least, curious the inflection that occurred in the trajectory of research on material culture attested in this book by Diana and Wiara. From the internalist exploration of school culture, but concerned with the pedagogical and political meanings of objects, to the understanding of the transnational circuit of school artifacts, there is certainly a change of perspective and an in-depth reflection on the knowledge already accumulated. We find in the book another way to inquire into school culture by inserting it into the economic dimension of society in contexts exogenous to school [...]⁴.

The highlighted excerpt of the preface emphasizes the change of perspective in the research on school material culture presented by Vidal and Alcântara. The transition from internalist exploration to an expanded analysis, which inserts objects into the transnational and economic circuit of society, is central to understanding the theoretical and methodological impact of the work. In this sense, the book highlights two essential aspects: by challenging the internalist analysis, the authors suggest a new methodological horizon, in which school objects are no longer understood only as elements of pedagogical practice and are studied as products of transnational economic processes. In addition, the insertion of school culture in contexts exogenous

² Research project entitled *A escola na sua materialidade: estratégias e táticas (Distrito Federal, 1927-1930)*.

³ Research project entitled *Saberes e práticas em fronteiras: por uma história transnacional da educação (1810-...)*.

⁴ R. Chaloba, *Prefácio*, in D. Vidal, W. Alcântara, *História econômica da escola: Uma abordagem antropológica em circuito transnacional (1870-1910)*, São Paulo, UNESP, 2024, p. 8.

to the school expands the possibilities of investigation, emphasizing the role of economic and cultural exchanges in school materiality. The book suggests that school culture cannot be fully understood without its insertion into the broader flow of economic and social exchanges, especially in contexts outside the school walls. Thus, the study is not limited to definitive conclusions, but invites researchers to continue investigating and expanding the theoretical and methodological horizons. Another point highlighted by Chaloba (2024) refers to the transnational history of education, which, according to her, has gained prominence in academic research. However, operationalizing this approach in a precise and skillful way still represents a challenge, which reinforces the importance and contribution of this book to the field⁵. The sources analyzed throughout the book constitute one of the main differentials of Vidal and Alcântara's research. The authors mobilize a wide variety of primary registrations, encompassing institutional archives, trade catalogs, patent registrations, statistical reports, and government documentation. This wide range of materials enables the detailed reconstruction of the relationships between the circulation of school artifacts, economic dynamics and educational processes, offering an integrated and comprehensive view of the theme. It is highlighted the use of documents that point out the material exchanges between countries in Europe and South America, as well as local sources, which enrich the analysis by connecting regional and global contexts, consolidating a transnational perspective, for the authors: «[...] From the second half of the nineteenth century, the school became increasingly a transnational phenomenon, with manifestations, dynamics and organizations peculiar to its local realities [...]»⁶.

Regarding the methodology adopted, the authors combine economic history with the anthropology of education, using material culture as a central analytical lens. The transnational approach allows connecting different geographical contexts and exploring material and cultural exchanges, without losing sight of local particularities, which makes it possible to analyze not only the circulation of school objects, but also their economic, pedagogical and cultural implications. Also, the methodology articulates empirical data with a theoretical basis, which includes references such as material anthropology, transnational history, cultural history, among others. The game of scales assumes a central function, shifting the focus between transnational and local perspectives.

In terms of originality, the proposal to situate the economic development of schools in the transnational context dialogues with themes still little explored in educational research. These reflections are organized into eight chapters, in addition to an introduction and a conclusion, followed by bibliographic references and a specific section dedicated to the archives and sources consulted.

⁵ *Ibid.*, p. 9.

⁶ *Ibid.*

This division between source and bibliography stands out, which not only facilitates the work of other researchers interested in deepening the investigation, but highlights the diversity used by the authors. They clarify that the chapters are derived from articles previously published in English, having been reformulated and expanded to compose the book. In addition, they point out that chapter six, the introduction and the conclusion are unpublished texts, prepared specifically for this publication. Each of the eight chapters of the book concludes with final comments, in which the authors resume and discuss the main points addressed throughout the chapter, reinforcing the connections between the themes presented and their implications for the field of the history of education.

Chapter one, *Da cultura material escolar à história econômica da escola* [*From material school culture to the economic history of the school*], discusses the role of material culture in the formation of the modern school, highlighting how school objects and everyday practices reflect and influence the educational economy. The approach is detailed, with an analysis of the economic implications of school material culture, which is introduced in the chapter as an analytical lens to investigate the economic history of school institutions and is perceived as a constitutive and active element in the history of education. Four strands of study on school materiality are discussed, namely: museological or educational heritage; technological or innovation; librarian or school textbooks and, finally, the sociocorporal. The discussion proposed by the authors is enriched by the transdisciplinary approach, which articulates cultural history, material anthropology and economic history. Vidal and Alcântara explore the interdependence between the physical space of the school and the associated economic practices, demonstrating how the school environment is simultaneously a pedagogical space and a reflection of broader economic and social transformations. Besides, the authors problematize the transnational circularity of school objects, showing that pedagogical materials, school furniture and manuals were not static, but products that moved between countries, crossing geographical and cultural borders. Vidal and Alcântara argue that school material culture should be understood as part of a broader economic system, in which educational artifacts act as mediators of the relationships between teaching, technology and the economy. The chapter also cites initiatives of scientific societies of History of Education and some documentation centers that preserve schoolbooks. In addition, studies by Italian researchers that address the economic dimension of the mass school are mentioned, contributing to a more in-depth analysis of the theme.

Chapter two, *Sobre marcos temporais e categorias* [*On time frames and categories*], explores the categories of statistics and comparative education, pointing out how educational data has shaped public policies in the European and Latin American context. Vidal and Alcântara discuss how data collection and comparison between education systems influenced the formulation

of public policies between 1870 and 1910, mainly in the European and South American context. The discussion focuses on cultural mediators and the role of statistics as a tool for the economic development of schools. The authors' analysis shows that the advancement of educational statistics enabled a more systematic view of school systems, allowing the identification of gaps, investment planning and the formulation of public policies. Vidal and Alcântara show how educational data came to be used not only as technical tools, but also as instruments of power, guiding political and economic interventions in different national contexts. In addition, comparative education has emerged as a strategic practice for understanding and evaluating the performance of school institutions on an international scale. At the beginning of the chapter, the authors discuss the research sources that support their analysis, highlighting the diversity and limitations of the available material, drawing attention to the access difficulties faced, especially in the Latin American context, in which archives are often incomplete or poorly preserved. Vidal and Alcântara reveal that, although statistics may seem objective, they are socially constructed and carry the political and economic intentions of their time. By examining the circulation of these data in the European and South American context, the authors demonstrate how education has become a field of dispute and negotiation between different social and political actors.

Chapters one and two of the book reviewed have a predominantly theoretical and methodological character, while, from the third chapter, analyzes based on a diverse set of sources begin, which include historical documents, pedagogical materials and institutional records. Throughout the book, theory and empiricism are integrated in an articulated way, allowing conceptual reflections to be supported by analyzes based on a rich and diverse set of historical sources.

Next, chapter three, *Artefatos escolares – Os quadros Parietais da Maison Deyrolle* [*School artifacts – The Parietal paintings from Maison Deyrolle*], focuses on the parietal paintings from Maison Deyrolle, France, which played an important role in the teaching of natural sciences in several countries. The authors highlight the role of the Brazilian School Museum, in this case it, the Museum, assumed the format of parietal paintings to circulate in school spaces. They examine the transnational circulation of these paintings as educational artifacts between Europe and Latin America, highlighting how pedagogical materials influence teaching methods and the standardization of pedagogical practices. The parietal paintings of the Maison Deyrolle were recognized for their visual quality and for addressing detailed and accessible scientific content, such as botany, zoology, anatomy and ecology. Its diffusion was driven by the expansion of modern educational systems and the growing importance of science education in the school curriculum, as well as the development of a transnational pedagogical industry. The parietal paintings were translated from French to Portuguese, according to Vidal and Alcântara, more

than a translation, it was a cultural translation⁷, as the elements were changed and reorganized for use in the Brazilian context. From this perspective, the chapter inserts pedagogical artifacts into a transnational circuit, showing that school objects are carriers of power relations, modernization and standardization, fundamental for understanding the economic and cultural history of education. Thus, the chapter focuses on the circulation of people, ideas and artifacts, the authors outline that in addition to an adaptation of the materials, what occurred was a cultural hybridization, an idea that permeates the entire book.

Chapter four, *Comércio local e consumo escolar – A Casa Lebre* [Local Commerce and School Consumption – Casa Lebre], examines the role of Casa Lebre as a supplier of materials to schools in São Paulo. The chapter provides a detailed overview of local consumption and commerce networks. The analysis proposed by the authors goes beyond the description of commercial activities, exploring the complexity of local consumption networks that were established around São Paulo school education. Casa Lebre acted not only as a supplier of basic school materials but also as an intermediary between industrial production and educational institutions. This strategic role highlights the articulation between the local market and educational demands, connecting the regional economy to the expansion of formal education in Brazil. The authors point out that the growth of the Normal School and the Polytechnic School in São Paulo was accompanied by a greater need for didactic and pedagogical resources, which boosted the performance of local companies such as Casa Lebre. These institutions were not only consumers, but also cultural mediators, responsible for defining the appropriate pedagogical materials and disseminating modern educational practices. Vidal and Alcântara argue that Casa Lebre is a paradigmatic example of how the local market supported and enabled educational demands at a time of school expansion. By articulating producers, consumers and public institutions, it contributed to the dissemination of standardized materials, facilitating the circulation of school objects that enabled the modernization of education. Throughout the chapter, the authors operate with the idea of cultural symbiosis.

In turn, chapter number five, *Indústria escolar transnacional – as carteiras escolares* [Transnational school industry – school desks], discusses the process of industrialization of school furniture, with an emphasis on the development of school desks as symbols of pedagogical transformation and standardization of educational environments. Vidal and Alcântara analyze the trajectory of these desks, highlighting how these changes reflect the broader transformations in the pedagogical and physical organization of schools. The chapter begins with a historical analysis of the period when school furniture was pro-

⁷ M. Pallares-Burke, *O Carapuço e outros ensaios de tradução cultural*, São Paulo, Hucitec, 1996; R. Chartier, *A aventura do livro: do leitor ao navegador*, São Paulo, UNESP, 1998.

duced in an artisanal way and on a small scale, adapted to the specificities of local institutions. With the advance of industrialization in the late nineteenth and early twentieth centuries, school desks began to be produced on a large scale, which enabled the standardization of educational spaces. This process was driven by the growing demands for modern schools and the need to discipline the school environment. The authors emphasize that the mass manufacturing of the desks was accompanied by a pedagogical discourse that sought to optimize learning and discipline students' behavior. School desks were not just functional objects; they symbolized the standardization and modernization of teaching on a global scale. Vidal and Alcântara explore the transnational circulation of these pieces of furniture and highlight the role of school desks in the physical organization of classrooms, promoting order, discipline and efficiency. In addition, the analysis of the transnational circulation of school desks broadens the understanding of the economic and cultural relationships that shaped educational systems in the period. For the authors, perhaps the school desk is the most exemplary case of the transnational school industry. School furniture catalogues are also covered in the chapter.

Chapter six, *Indústria escolar local – Eduardo Waller & Comp.*, [Local school industry – Eduardo Waller & Comp.], analyzes the national school furniture industry in the 19th century. Focused on Eduardo Waller & Comp., one of the first Brazilian companies dedicated to the production of school furniture and pedagogical equipment in the early Twentieth century, the chapter examines its role in the production of school furniture in Brazil, including patented products and relationships with local educational institutions. Vidal and Alcântara address innovation and adaptation to local educational demands as fundamental aspects of Waller's performance. The authors explore the development of this industry by showing how the company contributed to the consolidation of the school material culture in Brazil and to the pedagogical models imported into the Brazilian educational reality. Eduardo Waller & Cia. not only met the demands of Normal Schools and other public institutions, but also played a crucial role in strengthening the local market for educational goods, connecting to the context of modernization of teaching and educational policies implemented during the First Republic (1889-1930)⁸. The chapter seeks to highlight the importance of the national industry in creating its own educational identity, while dialoguing with global pedagogical models.

Chapter seven, *Mercado livreiro – a Biblioteca do povo e das escolas* [Book Market – the Library of the people and schools], discusses the formation of the

⁸ The First Republic in Brazil (1889-1930) was marked by an oligarchic political system, known as the governors' policy, and by the predominance of agrarian elites in the states of São Paulo and Minas Gerais, consolidating an economic model based on coffee exports and regional political control. For further analysis, see: L. Schwarcz, H. Starling, *Brasil: Uma biografia*, São Paulo, Companhia das Letras, 2015.

educational book market in the late nineteenth and early twentieth centuries, focusing on strategies for the commercialization and circulation of school-books. The term Library, in this case, is not that of a building for the storage of books, but rather that of a collection that was what characterized the Library of the people and schools. The authors analyze it as an innovative initiative aimed at expanding access to books and promoting education as an instrument of social transformation. Created in the context of modernization and expansion of educational systems, it sought to meet the lack of accessible reading materials appropriate to the needs of the school population, especially the less favored classes. Vidal and Alcântara highlight the commercialization strategies used by the Library, which combined affordable prices, wide distribution and content aligned with the pedagogical demands of the time. This model allowed books to reach regions far from large urban centers, expanding the reach of formal education and stimulating the formation of a reading culture among students. The chapter also explores the formation of the educational book market, which was structured from the articulation between publishers, bookstores and school institutions. Vidal and Alcântara analyze how this market has expanded in Brazil. The authors problematize the dual function of the book market: the Democratization of knowledge and the instrument of ideological control.

The eighth and final chapter, *Monopólios e Cartéis – o Syndicat Commercial du Mobilier et du Matériel d’Enseignement* [*Monopolies and Cartels – Syndicat Commercial du Mobilier et du Matériel d’Enseignement*], offers a critical analysis of the role of *Syndicat*, a French monopoly that exerted influence on the school furniture market in Brazil during the late nineteenth and early twentieth centuries. Vidal and Alcântara investigate the economic and political dynamics involved, revealing their implications for the price structure, the standardization of products and the offer of educational materials. The analysis brings to light the economic complexities in the provision of school materials and their implications for the educational economy. The authors discuss how *Syndicat Commercial du Mobilier et du Matériel d’Enseignement* consolidated and controlled the supply of school furniture in South American countries, including Brazil. The analysis reveals how *Syndicat*’s influence shaped not only the choices of educational institutions but also the purchasing policies of public administrations, limiting the options available and imposing a price control that hampered local competition. This situation directly affected national industrialization. The authors point out that monopolies cannot be analyzed in isolation, as they are inserted in a network of global political and economic interests. This articulation between education, market and power shows how school materials were, at the same time, tools of modernization and economic domination.

In the work *Economic history of the school: an anthropological approach in a transnational circuit (1970-1910)*, when investigating the relationship be-

tween school material culture and economic dynamics, Vidal and Alcântara challenge the internalist narratives that restrict the study of educational practices to national borders. In the Brazilian context, the work highlights the role of the local market and regional adaptations in the expansion of education, as exemplified by the performance of companies such as Eduardo Waller & Comp. and Casa Lebre. This approach values the economic and cultural specificities of Brazil, offering a detailed analysis of the schooling processes in the country. In a transnational perspective, the book reveals how material exchanges between countries in Europe and America have shaped the modern school, both in economic and pedagogical terms. By investigating the intersections between economic history, anthropology of education and transnational circulation, the book not only broadens the understanding of schooling processes, but also invites new studies.

Forum / Discussioni

Intelligenza artificiale generativa e fonti storico-educative: prospettive metodologiche

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Generative Artificial Intelligence and Historical-Educational Sources: Methodological Perspectives

ABSTRACT: The paper examines the methodological potential of generative artificial intelligence in historical-educational research, addressing a subject that has so far remained unexplored. After outlining the functioning of Large Language Models (LLM) and Retrieval Augmented Generation (RAG) systems, it analyses their most promising applications, including the automatic transcription of manuscripts, the translation of texts in ancient languages, and the processing of extensive documentary corpora. Through case studies, the research demonstrates how RAG architectures can effectively overcome the limitations of LLMs in analysing large collections of historical sources. Finally, a structured methodological framework is proposed to integrate these technologies into historical-educational research, establishing an operational protocol for documentary analysis.

EET/TEE KEYWORDS: Generative Artificial Intelligence; Large Language Models; Retrieval Augmented Generation; History of Education; Historical Research Methodology.

Introduzione

L'intelligenza artificiale generativa, fondata sui *Large Language Models* (modelli di linguaggio di ampie dimensioni, d'ora in poi LLM), costituisce un ambito di innovazione tecnologica che pone sfide rilevanti agli storici. Nel panorama internazionale, i primi tentativi di analisi del rapporto tra intelligenza artificiale e ricerca storica sono emersi in occasione dei panel tematici presentati durante il 137° convegno annuale dell'*American Historical Association*

(gennaio 2024)¹. I panel sono stati preceduti da un forum ospitato dalla rivista *American Historical Review*, intitolato *Artificial Intelligence and the Practice of History*. L'iniziativa, concepita con l'intento di offrire uno spazio di riflessione critica sulle implicazioni delle tecnologie emergenti, prendeva spunto dalla constatazione che, con la progressiva digitalizzazione del patrimonio documentale, «gli algoritmi di apprendimento automatico diventeranno strumenti essenziali per la ricerca storica, influenzando non solo l'attività sociale, ma anche il processo di costruzione della conoscenza storica»².

Le sfide poste dalle tecnologie emergenti non sono quindi di natura semplicemente tecnica, ma investono: il piano epistemologico (in che modo si ridefiniscono i processi di costruzione e di validazione della conoscenza storica nell'era dell'IA); il piano metodologico (come integrare i nuovi strumenti nei protocolli di ricerca storica) e quello etico (qual è il ruolo dello storico e la sua responsabilità nell'uso di tali strumenti).

Nell'ambito specifico della *History of Education* si osserva, tuttavia, una marcata lacuna, come attestano le ultime edizioni della *International Standing Conference for the History of Education* (ISCHE), dove mancano contributi dedicati a questo tema. Eppure la digitalizzazione, che sta generando una trasformazione rilevante nelle modalità di accesso ai documenti, riguarda anche l'ambito storico-educativo³. Dal punto di vista della pratica storica, i modelli di linguaggio potrebbero costituire strumenti utili, permettendo allo storico dell'educazione di analizzare vaste collezioni di fonti ricorrendo a interrogazioni nel linguaggio naturale.

Il presente contributo si concentrerà, quindi, sull'aspetto esclusivamente metodologico, illustrando possibili modalità per integrare le nuove tecnologie di intelligenza artificiale generativa nei protocolli di ricerca storico-educativa, ponendo al contempo in rilievo la questione cruciale della loro affidabilità. L'intento è quello di illustrare soltanto le procedure metodologiche replicabili dagli storici dell'educazione, evitando intenzionalmente di presentare quelle

¹ Cfr. *137th Annual Meeting Program*, consultabile sul sito web del convegno al seguente indirizzo: <<https://www.historians.org/past-meeting/137th-annual-meeting/>> (ultimo accesso: 28.02.2025).

² R.D. Meadows, J. Sternfeld, *Artificial Intelligence and the Practice of History: A Forum*, «The American Historical Review», vol. 128, n. 3, 2023, pp. 1345-1349.

³ Basti qui ricordare il progetto *Google Books*. Il colosso di Mountain View ha stipulato una serie di accordi con alcune delle biblioteche più prestigiose al mondo per digitalizzare le loro collezioni librarie e renderle disponibili online, trasformando *Google Books* nella più imponente biblioteca digitale globale, con milioni di testi accessibili sulla sua piattaforma. Per il contesto italiano, merita particolare attenzione l'accordo siglato nel marzo 2010 tra il Ministero per i Beni e le Attività Culturali (MiBAC) e Google, che prevedeva la digitalizzazione di un milione di volumi di alto valore storico conservati presso le Biblioteche Nazionali Centrali di Roma e Firenze. Per una ricostruzione storica documentata e un'analisi critica accurata sul progetto *Google Book* si rimanda a: A. Jacquesson, *Google livres et le futur des bibliothèques numériques*, Paris, Éditions du cercle de la librairie, 2010.

tecniche che richiederebbero, ad oggi, risorse computazionali e competenze informatiche avanzate⁴.

Dopo un'introduzione al funzionamento dei *Large Language Models* e dei sistemi di *Retrieval Augmented Generation* (Generazione aumentata dal recupero, d'ora in poi RAG) – focalizzata sugli aspetti funzionali e strutturali maggiormente rilevanti per l'analisi delle fonti storiche – passeremo in rassegna gli studi pionieristici che hanno incorporato tali tecnologie nei protocolli di indagine storica, ricavandone indicazioni rilevanti. In particolare, esamineremo applicazioni degli LLM in due ambiti chiave anche per lo storico dell'educazione: la trascrizione automatica di fonti manoscritte e la traduzione di documenti redatti in lingue antiche. Successivamente, discuteremo il grado di conoscenza storica implicita negli LLM, ossia 'quanto sanno' di storia sulla base del loro addestramento. Nella parte seguente, analizzeremo invece gli approcci basati sulla Generazione aumentata dal recupero, concepita per mitigare alcuni limiti intrinseci dei modelli linguistici, illustrandone l'utilizzo per l'analisi di vasti corpora documentali. Infine, nella sezione conclusiva, proporrò un quadro metodologico per l'impiego consapevole e proficuo dell'IA generativa nello studio delle fonti storico-educative.

1. I *Large Language Models*

Gli LLM rappresentano una delle innovazioni più rilevanti nel campo del *Natural Language Processing*, ramo dell'informatica che studia l'interazione tra linguaggio umano e sistemi computazionali. Tali modelli si distinguono per la capacità di elaborare e generare testo in linguaggio naturale con un livello di coerenza e pertinenza contestuale senza precedenti⁵.

Seguendo Cristianini, per comprendere il loro funzionamento è utile distinguere tre livelli concettuali: l'*agente* con cui interagiamo (ad esempio, il noto ChatGPT di OpenAI); il *modello di linguaggio* sottostante, definito LLM, che per il modello di OpenAI è attualmente il GPT-4.5 (*Generative Pre-trained*

⁴ Ci riferiamo, in particolare, alle tecniche di *Fine-tuning* che, pur dimostrando notevole efficacia nell'ambito degli studi storici, richiedono la costituzione di team interdisciplinari composti da storici e informatici. Nonostante l'interdisciplinarietà sia il paradigma metodologico dominante nel contesto dell'intelligenza artificiale applicata alle discipline umanistiche, riteniamo opportuno che lo storico sviluppi competenze specifiche per l'utilizzo di tali tecnologie, una posizione apparentemente controcorrente rispetto alla tendenza attuale, ma che si fonda su precise ragioni metodologiche che saranno articolate nella sezione conclusiva del presente contributo.

⁵ Per una introduzione che esplora le fondamenta matematiche dell'intelligenza artificiale, in una prospettiva storica, rimandiamo al volume di A. Ananthaswamy, *Perché le macchine imparano. L'eleganza della matematica dietro all'AI*, Milano, Apogeo, 2024.

Transformer, versione 4.5); e l'*algoritmo* che crea il modello a partire da grandi volumi di dati testuali (il *Transformer*)⁶.

Alla base degli LLM vi è un modello probabilistico del linguaggio, che apprende regolarità e correlazioni statistiche dai testi su cui addestrato. Durante la fase di addestramento, i modelli apprendono a predire l'elemento linguistico successivo (il *token*) in una sequenza testuale, sviluppando progressivamente una 'comprensione' implicita delle regole grammaticali e sintattiche e delle relazioni semantiche. Il processo, definito *pre-training*, avviene in modo auto-supervisionato, ossia senza intervento umano diretto, consentendo al modello di acquisire 'conoscenze' in modo autonomo. In una successiva fase, definita di *fine-tuning* (ottimizzazione), il modello viene specializzato su dataset più mirati e con obiettivi specifici, perfezionando ulteriormente le sue capacità.

Ciò che ha colto di sorpresa la comunità scientifica degli informatici è constatare come questi modelli, pur essendo stati progettati primariamente per prevedere il *token*⁷ successivo in una sequenza linguistica, manifestano inaspettate capacità in ambiti quali «il ragionamento logico, l'espressione creativa e la capacità deduttiva», unitamente a una conoscenza enciclopedica che spazia dalla «letteratura alla medicina fino alla programmazione informatica»⁸.

Recentemente, si è anche assistito all'evoluzione dai modelli esclusivamente testuali a modelli in grado di elaborare e generare contenuti in diverse modalità: testo, immagini, audio e video, denominati funzionalmente *Large Multimodal Models*.

⁶ Cfr. N. Cristianini, *Machina sapiens. L'algoritmo che ci ha rubato il segreto della conoscenza*, Bologna, il Mulino, 2024. L'architettura *Transformer*, presentata nel 2017 da un team di ricercatori di Google, ha rivoluzionato il campo dell'elaborazione del linguaggio naturale e creato le basi per tutti i moderni LLM. Il suo meccanismo di auto-attenzione consente ai modelli di analizzare simultaneamente l'intero testo, assegnando un peso differenziato a ciascuna parola in relazione al contesto. L'approccio supera i limiti delle precedenti architetture neurali, migliorando l'abilità di catturare relazioni semantiche anche tra parole distanti. L'articolo seminale che descrive il *Transformer* è: A. Vaswani, N. Shazeer, N. Parmar *et alii*, *Attention is all you need*, «Advances in Neural Information Processing Systems», vol. 30, 2017, pp. 5998-6008.

⁷ Il termine *token* indica l'unità minima di testo elaborata da un modello di linguaggio. Un *token* può corrispondere a una parola intera, a una parte di parola o persino a un singolo carattere, a seconda della segmentazione adottata dal modello. È stato calcolato che 100 *token* corrispondono approssimativamente a 75 parole. Per essere processati, i *token* vengono convertiti in rappresentazioni numeriche attraverso un processo chiamato *embedding*, che associa a ciascun *token* un vettore in uno spazio matematico ad alta dimensione, una trasformazione che consente al modello di catturare relazioni semantiche e sintattiche tra le parole e di generare risposte coerenti con il contesto.

⁸ Cfr. S. Bubeck, V. Chadrakaran, R. Eldan *et alii*, *Sparks of artificial general intelligence: Early experiments with gpt-4*, 2023. Il noto documento redatto dai ricercatori di Microsoft e disponibile in rete, prende in rassegna le capacità del modello di Openai GPT-4, in grado di svolgere con successo compiti nuovi e complessi e manifestare ampie conoscenze in diversi domini. Tale comportamento, caratterizzato da un salto qualitativo improvviso che emerge solo superando una determinata soglia di scala (in termini di parametri o quantità di addestramento), rappresenta quelle che vengono definite in letteratura come «capacità emergenti».

Parallelamente, sono state potenziate le capacità di ragionamento degli LLM, attraverso tecniche specifiche in fase di addestramento, che hanno dato origine a modelli ottimizzati per affrontare compiti di ragionamento complesso, i cosiddetti *Reasoning Models*. Infine, sono comparsi i modelli agentici, sistemi basati sugli LLM e progettati per agire autonomamente in ambienti digitali, eseguire sequenze di azioni e perseguire obiettivi complessi con supervisione minima⁹.

Nonostante queste impressionanti capacità ed evoluzioni, gli LLM presentano limiti strutturali rilevanti per la ricerca storica. Innanzitutto l'affidabilità: i modelli linguistici possono generare affermazioni plausibili ma non necessariamente verificate, il che è particolarmente critico dove è imprescindibile l'accuratezza, come negli studi storici. Inoltre, la cosiddetta finestra di contesto (*Context Window*), vincola il numero di token elaborabili simultaneamente, ostacolando l'analisi di vaste collezioni documentarie¹⁰. Infine, gli LLM non sono nativamente progettati per il recupero di informazioni specifiche da grandi raccolte di dati, bensì produrre testo coerente basato sull'input ricevuto.

Un approccio promettente per mitigare queste limitazioni è offerto dall'architettura *Retrieval Augmented Generation*, attualmente considerata una delle soluzioni più efficaci anche per l'analisi di corpora documentali.

2. I sistemi di *Retrieval Augmented Generation*

I sistemi RAG rappresentano un'importante innovazione nell'ambito dell'intelligenza artificiale generativa, poiché consentono di ovviare a diversi limiti insiti negli LLM. Sono, infatti, progettati per integrare un meccanismo di recupero di informazioni da fonti esterne (*knowledge base*), consentendo agli LLM di accedere a documenti pertinenti per generare risposte più affidabili e contestualizzate¹¹.

⁹ Un esempio autorevole di modello agentico, progettato per la ricerca scientifica da Google DeepMind, è rappresentato da *AI Co-Scientist*, in grado di assistere i ricercatori di ambito biomedico in tutte le fasi della ricerca (J. Gottweis, W.H. Weng, A. Daryin *et alii*, *Towards an AI co-scientist*, 2025, <<https://arxiv.org/abs/2502.18864>> (ultimo accesso: 12.02.2025)).

¹⁰ La finestra di contesto nei modelli di linguaggio indica il numero massimo di token elaborabili in un singolo prompt o durante una sessione interattiva. Essa definisce essenzialmente la quantità di testo che il modello può 'ricordare' e analizzare contemporaneamente per produrre risposte coerenti e contestualmente rilevanti. Le dimensioni di queste finestre variano significativamente tra i diversi modelli. GPT-4, per esempio, supporta fino a 128.000 token (equivalenti a circa 96.000 parole), mentre Claude 3.5 Sonnet di Anthropic gestisce fino a 200.000 token. Il modello Gemini 2.0 di Google, riesce a processare fino a 2 milioni di token. Per offrire un paragone concreto, considerando che la rivista in cui appare questo articolo contiene mediamente 400 parole per pagina, la finestra di contesto di GPT-4 equivale a 240 pagine, quella di Claude 3.5 a 375 pagine, mentre Gemini 2.0 può elaborare l'equivalente di 3.750 pagine.

¹¹ La RAG è stata introdotta nel 2020, e presentata come un'architettura che migliora significativamente le prestazioni degli LLM in compiti che richiedono conoscenze fattuali precise (P.

Nel contesto della ricerca storico-educativa, l'architettura RAG risulta particolarmente vantaggiosa per l'analisi di vaste collezioni di fonti. Le raccolte di vaste dimensioni e continuità temporale – ad esempio, la collezione completa di un giornale scolastico, la serie di cataloghi di un editore scolastico, i corpora normativi, le collezioni di manualistica scolastica, e così via – rappresentano risorse di straordinario valore ma pongono significative sfide metodologiche per la loro analisi esaustiva. La mole supera non solo le possibilità di un'analisi manuale sistematica, ma anche le capacità di elaborazione tramite gli LLM, che sono vincolati da una finestra di contesto limitata che non consente di processare simultaneamente un intero corpus di fonti, ma, soprattutto, limitati dal fatto che non sono progettati per «recuperare informazioni», ossia non sono sistemi di *Information Retrieval*.

I sistemi RAG superano tali limitazioni, permettendo di recuperare selettivamente le informazioni più pertinenti a ogni specifica domanda posta dall'utente, che verranno poi elaborate da un LLM.

Nello specifico, i sistemi RAG integrano in un unico processo tre componenti fondamentali che lavorano in sequenza:

- 1) Il sistema inizia con il recupero (*Retrieval*) delle informazioni più pertinenti dai documenti forniti dall'utente. Quando lo storico pone una domanda, questa componente cerca nei documenti disponibili le informazioni più rilevanti per rispondere¹².
- 2) Segue il meccanismo di incremento (*Augmentation*) che arricchisce la domanda posta dall'utente con le informazioni recuperate. Questa fase combina i documenti selezionati con la domanda iniziale, creando un «prompt arricchito» che contiene sia la richiesta che le informazioni contestuali utili.
- 3) Infine, la *generazione* della risposta avviene tramite un LLM, che crea contenuti basandosi sul «prompt arricchito», producendo una risposta informata sulla base delle informazioni recuperate dai documenti esterni.

L'intera sequenza garantisce che le risposte generate siano non solo pertinenti alla domanda, ma anche verificabili attraverso i documenti di riferimento. I documenti citati vengono infatti richiamati a supporto delle affermazioni generate dal modello linguistico, un aspetto metodologicamente decisivo in ambito storico, dove l'accuratezza e la tracciabilità della fonte sono requisiti

Lewis, E. Perez, A. Piktus *et alii*, *Retrieval-augmented generation for knowledge-intensive NLP tasks*, «Advances in Neural Information Processing Systems», vol. 33, 2020, pp. 9459-9474).

¹² Nel processo di recupero, un modello di embedding trasforma sia la query che i documenti in rappresentazioni vettoriali multidimensionali che catturano il significato semantico del testo. Il sistema calcola matematicamente la similarità coseno tra il vettore della query e i vettori dei documenti precedentemente indicizzati nel corpus. I documenti i cui vettori presentano la maggiore similarità con il vettore della query vengono identificati come i più rilevanti. Questo processo di matching vettoriale permette di superare le limitazioni delle ricerche basate su semplice corrispondenza di parole chiave

fondamentali. La figura 1 illustra parte del risultato finale del processo, utilizzando come fonte documentale 34 annate del periodico *I diritti della scuola*, relative al periodo compreso tra 1899 e il 1940, accessibili e scaricabili tramite l'Emeroteca virtuale della Biblioteca Nazionale di Roma. La domanda posta è relativa all'analisi degli articoli che trattano della disciplina scolastica; la risposta data dal modello linguistico è corredata dai riferimenti alle fonti originarie.

The image shows a digital interface with a search bar containing the text "La disciplina scolastica". Below the search bar, there are two columns of search results. The left column lists several articles with their titles and page numbers, such as "La disciplina scolastica" by Luigi Prosperi (pages 37-39) and "A proposito di disciplina scolastica" by Andrea de Rita (pages 39-41). The right column contains a list of related articles, including "Proprietà critica la Commissione che ha riveduto il regolamento generale per l'istruzione primaria, sostenendo che ha diminuito i mezzi disciplinari a disposizione dei maestri" and "Menziona la soppressione della privazione della ricreazione come punizione, ritenendola un errore". At the bottom of the interface, there is a button that says "Chiedi qualsiasi cosa".

Pic. 1. Esempio di risposta generata dal modello linguistico con riferimenti alle fonti

Analogamente agli LLM, anche le architetture RAG negli ultimi tempi hanno registrato una rapida evoluzione: dalle prime implementazioni con architetture relativamente semplici, si è passati a sistemi più avanzati che ottimizzano sia la fase di recupero delle informazioni sia la loro integrazione nel processo generativo. Allo stato dell'arte, si sperimentano sistemi RAG modulari, che offrono componenti specializzati configurabili per adattarsi a esigenze specifiche¹³. Tale flessibilità risulta particolarmente preziosa nell'ambito della ricerca storico-educativa, dove le fonti variano notevolmente per tipologia e struttura.

3. Applicazioni dei Large Language Models nella ricerca storica

Le sperimentazioni sull'uso degli LLM in ambito storico si stanno moltiplicando, rivelando interessanti potenzialità. I casi d'uso che seguono mostrano come, anche senza architettura RAG, gli LLM possano offrire contributi rile-

¹³ Y. Gao, Y. Xiong, X. Gao et alii, *Retrieval-augmented generation for large language models: A survey*, 2023, <<https://arxiv.org/abs/2312.10997>> (ultimo accesso: 12.02.2025). Lo studio di Gao e colleghi propone una tassonomia dei sistemi RAG, classificandoli in Naive, Advanced e Modulare, e analizza le tecniche per ciascuna categoria.

vanti anche per la ricerca storico-educativa, in particolare per la trascrizione di documenti manoscritti e per la traduzione di testi redatti in lingue antiche.

3.1. *Trascrizione di fonti manoscritte*

L'evoluzione degli LLM verso capacità multimodali ha aperto nuove prospettive per la trascrizione di fonti manoscritte, un aspetto di straordinaria importanza per la ricerca storica e storico-educativa. L'introduzione dei modelli linguistici multimodali come GPT-4, Claude Sonnet 3.5 e Gemini 1.5, avvenuta nel corso del 2023, ha segnato un punto di svolta, consentendo di superare molte delle limitazioni dei tradizionali sistemi di conversione del testo scritto a mano.

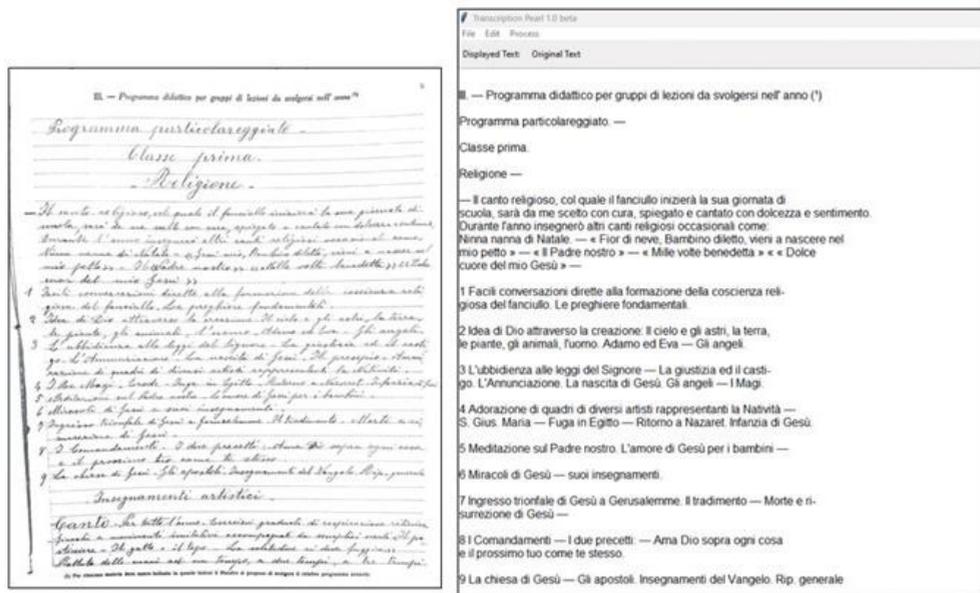
A differenza dei sistemi di *Handwritten Text Recognition* (HTR), che necessitano spesso di estensive fasi di pre-elaborazione delle immagini e addestramenti specifici per singoli stili di scrittura, i modelli linguistici multimodali possono trascrivere accuratamente documenti manoscritti senza necessità di addestramento aggiuntivo, grazie alla loro capacità di integrare l'analisi visiva dei caratteri con una comprensione del contesto linguistico, caratteristica particolarmente preziosa per lo storico dell'educazione, che lavora abitualmente su fonti manoscritte brevi, spesso molto diverse tra loro per tipo di grafia e condizioni materiali di conservazione.

Un contributo metodologico di rilievo è stato presentato dagli storici dell'università canadese "Wilfried Laurier", che hanno proposto un sistema bifasico di trascrizione¹⁴, che impiega due distinti modelli linguistici: nella prima fase, un LLM multimodale genera una trascrizione preliminare del documento, mentre nella seconda fase un modello distinto analizza simultaneamente il manoscritto originale e la trascrizione iniziale, procedendo a un processo di correzione e affinamento. L'adozione di due modelli separati si è rivelata metodologicamente cruciale, poiché i tentativi di «auto-correzione» effettuati mediante il medesimo modello non hanno prodotto miglioramenti significativi.

La trascrizione effettuata su un corpus di documenti in lingua inglese datati

¹⁴ M. Humphries, L.C. Leddy, Q. Downton *et alii*, *Unlocking the Archives: Large Language Models Achieve State-of-the-Art Performance on the Transcription of Handwritten Historical Documents*, «Digital Scholarship in the Humanities», vol. 39, n. 1, 2024, pp. 78-96. Humphries e colleghi offrono una descrizione approfondita del sistema bifasico, illustrandone chiaramente il fondamento teorico e l'efficacia dimostrata dai risultati empirici. Particolarmente utile è la descrizione puntuale della procedura di prompting adottata per massimizzare l'accuratezza degli LLM multimodali nella trascrizione e correzione di testi storici manoscritti. Il contributo è ulteriormente valorizzato dalla condivisione open-source del software sviluppato dai ricercatori, denominato *Transcription Pearl*, che include un'interfaccia intuitiva e impostazioni facilmente configurabili dagli utenti.

tra il 1761 e il 1827, caratterizzati da 33 differenti grafie, ha raggiunto livelli di accuratezza prossimi a quelli della trascrizione umana esperta, superando le prestazioni di noti software HTR, come Transkribus, dimostrando il potenziale di questa metodologia per l'analisi delle fonti manoscritte su larga scala e a costi contenuti. La figura 2 mostra un esempio di trascrizione automatica di una pagina di registro scolastico italiano degli anni Trenta del Novecento, ottenuta mediante il software sviluppato dagli storici canadesi.



Pic. 2. Esempio di trascrizione automatica effettuata con il software *Transcription Pearl*

3.2. Traduzione di documenti redatti in lingue antiche

Sul versante della traduzione di fonti storiche, un recente studio condotto presso l'Università di Zurigo documenta l'applicazione degli LLM utilizzati come strumenti di traduzione di un corpus documentario del XVI secolo, costituito da oltre 3.000 lettere in *Early New High German*, una variante storica della lingua tedesca diffusa tra il 1350 e il 1650¹⁵.

La procedura proposta dagli autori non prevede fasi di addestramento specifico dei modelli (*fine tuning*), generalmente complesse per uno storico che

¹⁵ M. Volk, D.P. Fischer, P. Scheurer, R. Schwitler, P.B. Ströbel, *LLM-based Translation Across 500 Years. The Case for Early New High German*, in *Proceedings of the 20th Conference on Natural Language Processing (KONVENS 2024)*, Vienna, Association for Computational Linguistics, 2024, pp. 368-375.

non dispone di un supporto informatico specializzato. Piuttosto, gli autori dello studio hanno utilizzato i modelli di linguaggio (GPT-4 e Gemini) nella loro configurazione standard, con una procedura basata su un'accurata strutturazione dei *prompt* (l'input testuale fornito al modello linguistico), arricchiti con informazioni lessicali.

I risultati della ricerca confermano la maggiore efficacia degli LLM multi-modali di gestire variazioni lessicali delle lingue storiche, rispetto ai sistemi di traduzione automatica come DeepL e Google Translate, determinata soprattutto dalla capacità degli LLM di sfruttare due livelli distinti di informazioni contestuali: quello esplicitamente fornito al modello tramite *prompt* arricchiti con informazioni puntuali, e quello implicito nel testo stesso, derivante dalla comprensione profonda del contesto linguistico e semantico proprio del tedesco protomoderno.

4. *La valutazione del grado di conoscenza storica dei Large Language Models*

Valutare il grado di conoscenza storica posseduto dai modelli linguistici non è una semplice curiosità, ma una reale esigenza metodologica. In questa direzione si inserisce il recente studio realizzato da un gruppo interdisciplinare composto da storici e informatici dell'Università di Poitiers (Francia), che ha analizzato in modo sistematico le capacità e, soprattutto, i limiti attuali degli LLM nell'ambito della conoscenza storica¹⁶. Focalizzata sul periodo moderno e sul territorio del Poitou – antica provincia francese –, la ricerca rappresenta uno dei primi tentativi di verifica empirica dell'affidabilità di tali modelli, in totale 14, nella restituzione accurata di fatti ed eventi.

La metodologia di valutazione si è basata su un rigido sistema di valutazione, articolato in 62 quesiti storici declinati in 268 query, equamente ripartite tra formulazioni in linguaggio naturale e in forma di parole chiave. Un aspetto particolarmente rilevante è l'impiego di 14 diversi LLM in configurazione standard, facendo leva esclusivamente sulla loro conoscenza preesistente.

I risultati sono piuttosto critici: l'accuratezza media si è fermata al 37,6%, evidenziando limitazioni sostanziali nell'affidabilità dei modelli¹⁷. È altresì rilevante l'analisi differenziata per domini tematici, dalla quale emerge che, an-

¹⁶ M. Chartier, N. Dakkoune, G. Bourgeois, S. Jean, *HiBenchLLM: Historical Inquiry Benchmarking for Large Language Models*, «Data & Knowledge Engineering», vol. 156, 2025, p. 102383.

¹⁷ Emergono tuttavia significative differenze tra i diversi modelli: Gemini raggiunge il valore più elevato (70,34%), seguito da Copilot (56,53%), ChatGPT con GPT-4 (53,54%) e GPT-3.5-Turbo (50,93%), mentre altri modelli mostrano prestazioni nettamente inferiori, fino al minimo del 4,10% registrato da Falcon.

che in presenza di eventi storici ben documentati, l'accuratezza non supera il 40,9%, invece per argomenti più complessi si abbassa ulteriormente al 23,2%. La ricerca, adottando una metodologia rigorosa, dimostra che le prestazioni dei modelli calano sensibilmente all'aumentare della complessità.

Da un punto di vista metodologico, questi dati suggeriscono la necessità di un approccio estremamente prudente nell'impiego degli strumenti di intelligenza artificiale generativa nella ricerca storica, soprattutto in ambiti specialistici come la *History of Education*. In questo settore disciplinare, le limitazioni riscontrate potrebbero risultare ancora più marcate, a causa di un probabile squilibrio nei dati di addestramento, in cui la storia dell'educazione è di certo sottorappresentata rispetto ad altri ambiti della ricerca, come ad esempio la storia della letteratura.

Le prospettive future indicate dagli autori dello studio fanno riferimento alla necessità di sviluppare metodologie più raffinate per integrare i modelli di linguaggio nei processi di indagine storica. Tale orientamento introduce la sezione successiva, dedicata all'integrazione degli LLM in architetture RAG, approccio che, anziché affidarsi unicamente alla conoscenza interna dei modelli, la arricchisce attraverso l'accesso diretto a fonti documentali, offrendo una possibile risposta agli evidenti limiti di accuratezza.

5. Applicazioni di sistemi di Retrieval Augmented Generation nella ricerca storica

La ricerca di Tran, González-Gallardo e Doucet si colloca nel filone di studi volto a valutare l'accuratezza di un sistema RAG, in particolare di una versione progettata per l'analisi di collezioni di stampa periodica¹⁸.

Per testare l'efficacia dell'architettura RAG progettata, il team di ricerca ha utilizzato un corpus particolarmente impegnativo: 4.836 articoli tratti da periodici francesi, finlandesi e tedeschi del XIX e inizio XX secolo, su temi ricorrenti e tra loro correlati. La scelta ha permesso di porre domande storiche complesse, così da verificare la capacità del sistema di recuperare e integrare

¹⁸ T.T. Tran, C.E. González-Gallardo, A. Doucet, *Retrieval Augmented Generation for Historical Newspapers*, in *ACM/IEEE-CS Joint Conference on Digital Libraries (JCDL)*, Hong Kong, 2024. Il lavoro presenta un'implementazione completa di un sistema RAG per l'analisi di periodici storici. Dal punto di vista tecnico, il sistema utilizza un'architettura sofisticata che combina un modulo di recupero semantico basato sul modello multilingue E5, un sistema di reranking che integra il punteggio Cohere con un'analisi delle entità nominate, e un modello generativo (LLaMA3) ottimizzato per la sintesi di informazioni storiche. Questa architettura consente di superare i limiti dei sistemi tradizionali di Named Entity Recognition, fornendo risultati più accurati anche in presenza di variazioni ortografiche e errori di trascrizione tipici dei documenti storici digitalizzati.

contenuti coerenti in presenza di diversità linguistica e stratificazione temporale.

I risultati sono stati valutati con un insieme integrato di metriche, sia quantitative e sia qualitative. Le prime hanno misurato in modo oggettive la pertinenza e l'accuratezza delle sintesi generate, evidenziando un buon recupero delle informazioni; le seconde hanno approfondito la capacità del sistema di gestire le peculiarità dei documenti storici, che si è mostrato capace di salvaguardare la coerenza semantica e la fedeltà alle fonti originali.

Restando nell'ambito della RAG, il contributo di Garcia e Weilbach, dal titolo suggestivo *Se le fonti potessero parlare*, approfondisce le potenzialità di un'architettura ottimizzata per due scopi principali: da un lato, valutare la capacità di un sistema RAG, debitamente progettato, di integrare il recupero di informazioni con l'elaborazione testuale per rispondere a interrogativi storici complessi di natura argomentativa, descrittiva e 'integrativa'; dall'altro, testare la sua efficacia nell'estrazione e nella strutturazione di dati fattuali¹⁹.

Sul primo versante, gli autori hanno selezionato ottantasei monografie accademiche, di rilevanza consolidata in ambiti di ricerca inerenti le migrazione irlandesi, la schiavitù e gli studi cubani. Il corpus è stato impiegato per verificare le capacità del sistema di produrre sintesi storiografiche, elaborare interpretazioni e fornire risposte coerenti con i paradigmi della disciplina storica.

Il secondo ambito di ricerca ha esaminato la capacità del sistema di estrarre e organizzare informazioni strutturate da fonti primarie, focalizzandosi sui nove volumi della *Historia de Familias Cubanas* di Francisco Javier de Santa Cruz y Mallen, in particolare per testare la capacità di recupero di dati anagrafici, relazioni di parentela e cronologie, elementi fondamentali per la ricostruzione delle dinamiche migratorie e sociali.

I risultati presentati dagli autori dello studio confermano il potenziale dell'architettura RAG nell'ambito della ricerca storica. Sul versante dell'analisi di interrogativi complessi relativi a fonti secondarie, il sistema ha restituito risposte con coerenza interpretativa e profondità argomentativa; sull'altro versante, il sistema ha dimostrato una notevole efficacia nel recupero e nella categorizzazione dei dati genealogici, automatizzando in parte operazioni che tradizionalmente richiedono un'ampia mole di lavoro manuale.

¹⁹ G. Gonzalez Garcia, C. Weilbach, *If the Sources Could Talk: Evaluating Large Language Models for Research Assistance in History*, 2023, <<https://arxiv.org/abs/2310.10808>> (ultimo accesso: 12.02.2025).

6. Verso un quadro metodologico per l'analisi delle fonti storico-educative

Per rendere operative nel campo della ricerca storico-educativa le indicazioni emerse dagli studi analizzati, è necessario adottare un quadro metodologico di riferimento che consenta di identificare chiaramente le tipologie di domande di ricerca che possono essere poste nel contesto degli strumenti di analisi basati sull'intelligenza artificiale generativa, nonché di anticipare quali risultati siano ragionevolmente ottenibili sulla base delle caratteristiche dei dati investigati.

Facendo riferimento allo studio di Chartier e colleghi²⁰, l'indagine storica supportata da strumenti di intelligenza artificiale generativa può essere formalmente articolata in tre dimensioni fondamentali, che ne delineano il campo operativo:

- *domande chiuse vs domande aperte*: le prime mirano a informazioni fattuali, le seconde richiedono spiegazioni più articolate;
- *domande quantitative vs domande qualitative*: le domande quantitative puntano alla raccolta di dati misurabili, mentre quelle qualitative mirano a aspetti descrittivi e interpretativi di eventi o fenomeni storici;
- *la tipologia di risposta attesa*, che varia da dati quantitativi e elenchi di dati, sino a descrizioni sempre più dettagliate per interrogativi aperti e complessi.

Dall'intreccio di queste tre dimensioni, emergono cinque tipologie di domande, ordinabili per complessità crescente: 1. domanda quantitativa chiusa, in cui si cercano dati numerici; 2. domanda qualitativa chiusa, finalizzata all'identificazione di metadati specifici; 3. domanda qualitativa chiusa, basata sulla raccolta di elenchi di dati; 4. domanda qualitativa aperta, centrata su definizioni o descrizioni sintetiche; 5. domanda qualitativa aperta, che richiede una trattazione più dettagliata e articolata di un problema. Nella tabella seguente (tabella 1) proponiamo un esempio concreto, applicato al caso specifico del giornale scolastico *I diritti della Scuola*, evidenziando per ciascuna tipologia di domanda i dati attesi e i quesiti esemplificativi.

²⁰ Chartier, Dakkoune, Bourgeois, Jean, *HiBenchLLM: Historical Inquiry Benchmarking for Large Language Models*, cit.

Tipologia di domanda	Dati attesi	Esempi di domande
Quantitativa (chiusa)	Dati numerici	Quante volte la rivista ha trattato il tema della retribuzione degli insegnanti tra il 1910 e il 1930? Quanti articoli dedicati alla scuola rurale sono stati pubblicati tra il 1899 e il 1922?
Qualitativa (chiusa)	Metadati	Chi era il direttore della rivista nel 1922? In che anno la rivista ha cambiato la sua periodicità di pubblicazione?
Qualitativa (chiusa)	Elenco di dati	Chi sono i collaboratori della rivista tra il 1918 e il 1922? Quali categorie di insegnanti erano maggiormente rappresentate negli articoli della rivista negli anni '20?
Qualitativa (aperta)	Definizione/Descrizione	Qual era la posizione della rivista sullo status giuridico degli insegnanti nel primo dopoguerra? Come la rivista affrontava il tema della formazione degli insegnanti negli anni '20 e '30?
Qualitativa (aperta)	Descrizione dettagliata di un problema	In che modo la rivista ha affrontato il dibattito sulla laicità dell'istruzione tra il 1906 e il 1908? Come gli articoli della rivista hanno discusso i punti di forza e le criticità della Riforma Gentile? Quali argomenti venivano utilizzati per sostenerla o criticarla?

Tabella 1. Esempificazione delle Tipologie di domande e dati attesi

L'adozione di questa tipologia di framework consente di strutturare con chiarezza l'indagine supportata dalle architetture basate sugli LLM, esplicitando sin dall'inizio il tipo di informazione atteso e fornendo criteri per valutare l'adeguatezza e accuratezza delle risposte ottenute.

Infine, è importante evidenziare alcune limitazioni tecniche attuali nell'impiego dei sistemi basati sull'intelligenza artificiale generativa. Non esiste, ad oggi, una soluzione tecnologica universale in grado di gestire tutte le tipologie di fonti storiche, a causa della loro natura intrinsecamente eterogenea. Ad esempio, manuali scolastici, riviste specialistiche e cataloghi scolastici richiedono adattamenti specifici degli strumenti impiegati. Pertanto, diventa indispensabile che lo storico dell'educazione acquisisca competenze tecniche adeguate per utilizzare efficacemente queste tecnologie nella ricerca, riducendo la necessità di ricorrere a supporti informatici esterni.

An Interdisciplinary Contextualization: Reasons behind the Translation of *Beggar Child**

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ABSTRACT: This paper reads a translated novel, *Beggar Child*, to indicate how translation co-relates to popular narratives. *Beggar Child* writes about childhood poverty and the character's later success in adulthood. The novel is translated to 'educate' Tibetan children about hardship and success. In this paper, we illustrate that the social context of producing the Tibetan version of *Beggar Child* falls on an aspiration of pursuing material

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well-being in modern Tibetan society. The aspiration is mainly embodied via two aspects. The first aspect is the problematic self-help success logic, and the second is the grotesque carnival depiction in *Beggar Child*

EET/TEE KEYWORDS: Social context and translation; Material well-being; Self-help; Carnavalesque; Modern Tibetan society.

If rich, you are the best grandson; if poor, you are the worst servant
 [rgyu yod na a khu'i tsha bo rgyu med na a khu'i gyog po]
 – a well-known Tibetan folk adage and lyrics from the Tibetan pop song *Joke*.

Introduction

The act of translation seemingly represents a certain value of literary works. For instance, the popularity of a children's book expands with the discourse of translation. However, the publishing of a translated text does not eliminate controversy. Translation of questionable source text occurs, and children indeed read various books. This paper explores the reasons behind the translation of disreputable books with the example of *Beggar Child*.

Lai Dongjin's autobiography, *Beggar Child* [*qigai kin a*], was first published in 2000 and then translated into several other languages¹. The Tibetan translation of *Beggar Child* [*sprang phrug*] appeared in 2016². *Beggar Child* tells how the main character, Ajin, grows up to be a successful man despite his struggling childhood. The bookshop from which I bought the Tibetan version of *Beggar Child* displays the book in the children's section³. Literary critics might frown upon the choice of translating *Beggar Child* due to scatological words, the portrayal of domestic violence, and the patriarchal ideology in this book. This paper's purpose is not to criticize the choice of the translator and editors as 'bad taste'; instead, this paper aims to concretize the reasons behind the translation. The authors of the paper contextualize reasons for translation beyond translators' subjectivity.

The topic of translators' subjectivity has consistently attracted scholarly

¹ This paper uses pinyin and Wylie transliteration for original sources in the Chinese and Tibetan languages.

² At present, there are no research papers on *Beggar Child* in the Chinese or English languages. Also, so far, only one paper, which is in Tibetan, addresses the Chinese to Tibetan translation issues of *Beggar Child*. The author Tsewang Tso provides an English title for her Tibetan paper: «An Analysis on the Translated Tibetan Novel: *Beggar Child*».

³ My main reason for listing it as a children's book lies in the nature of its readership. School students, whose ages fit into the United Nation's definition of children, read *Beggar Child*.

attention⁴. Meanwhile, translation is a process of re-creation⁵. Indeed, translators have a creative space, especially regarding lexical choices. Subjectivity plays a more prominent role in the early step of choosing the source text. David Ball writes: «A step-by-step, detailed examination of the actual process of translating a short literary text revealed that the translator's subjective thoughts and feelings only entered the process at the beginning – the choice of text»⁶. However, scholars also put forward how social context influences translators. Clare Gilbert defines that: «translation is embedded in and reflective of social context»⁷. With the example of *Beggar Child*, this paper explores how popular ideas in society contribute to the production of translated books. Hence, this article asks: how do we understand the societal Zeitgeist that concretizes the Tibetan translation of *Beggar Child*?

This paper aims to answer the above research question using textual analysis. The authors of this paper consider that interviewing the translator and the publisher might not be an appropriate research approach. The inappropriateness especially grows in the Tibetan social context. It might be pompous to ask the translator and the publisher: «Why do you translate *Beggar Child*? We don't think the book conveys a progressive message». We closely read the text *Beggar Child* to exemplify why the narrative reflected in the novel is sought after. Therefore, this paper contextually illustrates self-help factors and scatological humour in *Beggar Child* to understand the reasons for translation.

Translators and publishers might choose certain books if the content echoes a popular narrative. This paper suggests that the compatibility between stories and societal zeitgeists might be essential while choosing source texts for translation. In the case of *Beggar Child*, its zero-to-hero success story and depiction of hardship might have been its major attractions. *Beggar Child* confirms a popular narrative – overcome adversity and become rich. While choosing *Beggar Child* for translation, it seems that defects of patriarchy and sexism remain unseen because a drive for success appear too bright to notice other narratives.

⁴ W. Jun, *Translator's subjectivity in eco-translatology*, «Journal of Critical Studies in Language and Literature», vol. 1, n. 3, 2020, pp. 14-19; H. Gengsheng, *Translator-centredness*, «Perspectives: Studies in Translatology», vol. 12, n. 2, 2004, pp. 106-117; T. Lin, *A study on the translator's subjectivity*, in *2017 5th International Education, Economics, Social Science, Arts, Sports and Management Engineering Conference (IEESASM 2017)*, Zhengzhou, Atlantis Press, 2018, pp. 302-309; P. Denghua, *The subjectivity of the translator and socio-cultural norms*, «English Language Teaching», vol. 3, n. 3, 2010, pp. 29-34.

⁵ J. Johnston, *Translation as Simulacrum*, in L. Venuti (ed.), *Rethinking Translation: Discourse, Subjectivity, Ideology*, London, Routledge, 2018, pp. 42-56.

⁶ D. Ball, *Translator Subjectivity and the Process of Translation: The View of a Working Translator*, Taipei, The Wenshan Review of Literature and Culture, 2021, p. 1.

⁷ C. Gilbert, *Social context, ideology and translation*, in S. Harding, O. Carbonell Cortés (edd.), *The Routledge Handbook of Translation and Culture*, London, Routledge, 2018, pp. 225-242.

1. *Violence, patriarchy, and sexism in Beggar Child*

Beggar Child contains unhinged writing of a dominating father and suffering women. Patriarchy is reflected in the overt representation of a power imbalance in the impoverished family unit, with male figures abusing and exploiting women in *Beggar Child*. Ajin's father is probably the most paradoxical character in *Beggar Child*. Ajin's remembrance highlights his father's complicated and multidimensional nature, oscillating from vulnerability to wrath with great uncertainty. The walking stick of Ajin's blind father symbolizes how vulnerability and authority can coexist within a socially marginalized persona. Ajin's father simultaneously becomes the protector and the abuser of the family since he ruthlessly hits both trespassers and his family members with the walking stick. He is overtly domineering, with discipline and punishment as his primary approach. Ajin records eleven times about how his father severely beat him up in *Beggar Child*.

The power difference among family members is overt in the story as Ajin depicts his parents with striking opposition. While his father is outspoken, fearsome, foul-mouthed, short-tempered, and abusive, Ajin's mother is silent, harmless, passive, childlike, and pitiful. The contrast shows the husband's domination over the wife and children.

By adhering to a patriarchal system, Ajin's father treats women in the household as objects with a negotiable price. Ajin constantly hears his father describing his mother, in a mix of complacency and sympathy, as a «picked up [*sprang phrug*]» object from the street⁸. It is evident that she is belittled and dehumanized as a tradable object at the disposal of others. She has epilepsy and an intellectual disability, but her pain and struggle have been overlooked since she became the mad woman in the attic. Ajin's mother is an abandoned daughter, a mother who loses her reproductive rights, and a woman who is mentally and physically ill. Her misfortune is linked with inhumane parental abandonment, repetitive verbal humiliation, and domestic violence. The experience of Ajin's elder sister, another female character in the novel, highlights domestic patriarchal disregard for gender equality. The twenty-sixth chapter, «Sister's Destiny [*gcen mo'i las dbang*]», tells the appalling story of how the father sold his daughter to a brothel to cover his son's school fees and the family's living expenses⁹.

The education Ajin receives enables him to change his life completely. Ajin still acquiesces to his father's decision and enjoys the benefits of exploiting his sisters. Both Ajin and his father may be unaware of how problematic the patriarchy is. Ajin depicts complete obedience from other family members towards the father as natural and normal. The prevalence of gender inequality might

⁸ L. Dongjin, *Beggar child*, transl. by Dra Sang, Lhasa, TAR People's Publishing, 2017, p. 5.

⁹ *Ibid.*, p. 99.

have inappropriately normalized the immoral and unlawful treatment of women in the household. Despite the apparent depiction of patriarchy, gender inequality, and violence toward women, *Beggar Child* has been translated into different languages so that young people can correlate hardship with success.

2. *Materialism and success: the base of translating Beggar Child into Tibetan*

As a common everyday trait, materialism plays an equally conspicuous role in modern Tibetan society. This paper translates two sections of a famous Tibetan pop song, *Joke*. The purpose is to introduce the existence of material desire in Tibetan people's daily lives. Lyrics of the song not only tell current stories but also incorporate some folk adage from the past. The following lyrics satirize an excessive pursuit of materialism in Tibetan daily life.

The mother's son is marked for the golden throne
 The father took a prayer beads and went shopping
 The mother said prayer words and arrived home after buying meat
 Brother Tashi made a speech and drank alcohol
 Sister Lhamo resumed her secular life and ran away with her phone
 The uncle said Buddhist fortune-telling costs 200 Chinese yuan per time
 Is it a joke?
 The fancy car says rich
 If rich, you are the best grandson
 If poor, you are the worst servant
 If rich, we are good sisters
 If poor, we are lady and attendant
 If rich, you are the servant of wealth
 If poor, you are the servant of men
 (...)
 With money, there is love
 Without money, it's just fooling around
 With money, there is life
 Without money, it's just surviving

[a ma'i bu la rtags zhig rgyab nas gser gyi khri la bzhag gda'
 a pha lags kyis phreng ba bzung nas tshong ra skor la song dus
 a ma lags kyis ma ni bgrang bzhin sha nyos nas slebs song
 a bo bkra shis la rgya bshad nas chang gis bzi song gda' ra
 a ce lha mos 'khor ba spangs nas kha par mnyam du bros dus
 a khu khong gis cho ga gsung na dmangs sgor 200 red zer
 rlangs 'khor rdzig po la bltas na rgyu yod sa gda' o
 rgyu yod na a khu'i tsha bo
 rgyu med na a khu'i g.yog po
 rgyu yod na bu mo spun gnyis
 rgyu med na bu mo dpon gyog

rgyu yod na rgyu yi gyog po
 rgyu med na mi yi gyog po
 (...)
 dngul yod na brtse dung
 dngul med na rtsed mo
 dngul yod na vtsho ba
 dngul med na vtsho gnas]

Joke has been popular among the Tibetan community, and the band *Anu*, the song's writers, remains one of the most well-known Tibetan artists. Since its release, the song's lyrics have seldom received criticism or disagreement from the Tibetan community. Hence, the lyrics admit the existence of Tibetan people's worldly desires from past to present.

However, Tibetan people's pursuit of material success has rarely been the theme of any stories. Spirituality has become an overwhelmingly imagined identity of Tibetans. For instance, movies such as *Paths of the Soul* (2015) tell the story of a Tibetan family's arduous pilgrimage of kowtowing around 600 miles to the holy mountain Mt. Kailash. Similar pilgrimage is not universal among all Tibetans, yet religious piety has become a particularly emphasized impression and image of Tibetans.

The positive connotation of spirituality becomes a trap that leaves the described subjects out of the self-help-style competition regarding resources and survival. Money might talk, whereas spirituality is predominantly immaterial and silent, especially in the context of modernity. The most intense reality is the opposition between an increasing population and a diminishing number of resources. Hence, the self-help narrative propagates the mainstream's desire while effectively controlling others with its praise of spirituality. The claim that spiritual peoples, primarily indigenous peoples and minorities, are indifferent to money and power restricts changes in the current power structure. Any praise for these peoples as pure or uncorrupted is hypocritical since the unspoken consensus on spirituality is that it is unreal, fantastic, imaginary, and not of much use.

The imagination of a group of human beings as non-materialistic stems from the association of negativity with materialism. Dittmar and Ishama consider «materialistic value orientation» as a type of consumption which aims to improve self-image and social status, and they regard its effects on well-being as «detrimental»¹⁰. Materialism represents shallowness, vanity, and extravaganza. In addition, the image of spiritual Tibetans might result from a power imbalance. The claim of specific communities being indifferent to money and power most uniquely applies to Indigenous peoples and ethnic minorities.

The Tibetan social context might differ from what others, especially the

¹⁰ H. Dittmar, A. Isham, *Materialistic value orientation and wellbeing*, «Current Opinion in Psychology», vol. 46, 2022, p. 1.

West, have imagined. The Tibetan region bears the burden of living in others' imagination and becoming the Other. As a result, two ends of prejudice, the stigmatization of being barbaric or the idealization of being overly spiritual, paradoxically compose juxtaposing images of Tibetans¹¹. Yet worldly desire and material consumption rightfully exist in Tibetan society. Slavoj Žižek considers the Tibetan area «one of the central references of the post-Christian 'spiritual' imaginary» and «the projection of Western ideological fantasies»¹². Žižek further explains that Tibetans are required to be spiritual on behalf of others so that the demander can keep going with excessive consumerism while pretending to care about the loss of «authentic» Tibetan culture.

However, material well-being indicates how people understand and deal with problems induced by money¹³. Typical examples of material well-being cover «financial satisfaction, financial stress, feelings of financial security, subjective economic well-being, satisfaction with standard of living, satisfaction with material possessions, and sense of economic deprivation»¹⁴. According to the data from 1996, material well-being affects the happiness index of over 50% of the US population¹⁵. Researchers Gill Main et al. prove that the level of children's material deprivation can be one indicator while understanding children's overall happiness¹⁶. Material well-being is essential in everyone's life; it is naïve to imagine certain people can escape its impact.

Therefore, it is problematic to assume Tibetans are more spiritual than others or that Tibetans are becoming more materialistic because of modernization. Pursuing material goods sustains human lives, and wealth accumulation might generate power. It is inaccurate to deny the existence of Tibetan people's worldly desires. Moreover, materialistic advantages, such as money in a consumerism society, might bring unbiased justice by surpassing the line of racial and ethnic discrimination. Resultingly, the status of material well-being can significantly affect people, naturally leading to the pursuit of materialism. On the one hand, materialism carries the name of being selfish fulfilment; on the other hand, the power of establishing and indulging materialism turns into an image of success. Thus, themes of hardship and material well-being go hand in hand in many stories. The narrative of overcoming difficulties and heading

¹¹ J. Sissons, *First peoples: indigenous cultures and their futures*, London, Reaktion Books, 2005.

¹² Z. Slavoj, *On Belief*, London, Psychology Press, 2001, pp. 63-64.

¹³ M.J. Sirgy, *The psychology of material well-being*, «Applied Research Quality Life», vol. 13, 2018, pp. 273-301.

¹⁴ *Ibid*, p. 2.

¹⁵ A.L. Ferris, *Does material well-being affect non-material well-being?*, «Social Indicators Research», vol. 60, n. 1/3, 2002, p. 279.

¹⁶ G. Main et alii, *Inequality, material well-being, and subjective well-being: exploring associations for children across 15 diverse countries*, «Children and Youth Services Review», 2017, p. 69.

toward a better future is a recurring topic in children's books. And such a narrative attracts writers, editors, publishers and translators.

3. *Hardship and material well-being in Beggar Child*

Beggar Child seems to accentuate the acquisition of material success. Ajin's trouble vanishes with the change of his material well-being. Poverty is the source of Ajin's problems, and his relatively well-off status in adulthood becomes the panacea that brings him happiness. Ajin remembers spending his childhood in piercing wind, blazing sunshine, and pouring rain. Ajin writes: «The tree leaves are my roof, the cold land is my bed, the cemetery is my home [*shing gi yal gas thog dang sa grang mo nyal gri/ dur sa khang par bsten*]»¹⁷.

The writing of hardship in *Beggar Child* can be explained with the Marxist cultural outlook on the base and superstructure. Marx's early writing discusses human society in terms of how «the base», which stands for concrete objects such as material goods, determines «the superstructure», which refers to more abstract ideas such as social status and cultures¹⁸. Marx states: «The mode of production in material life determines the general character of the social, political and spiritual process of life»¹⁹. Raymond Williams sums up the dialectical proposition into «a determining base» and «a determined superstructure», or more bluntly, into the narrative of how «social being determines consciousness»²⁰.

Material well-being is vital for Ajin's family, as poverty causes much agony. Financial status affirmatively affects personal well-being, as Bruce Headey et al. have proved²¹. In *Beggar Child*, Ajin recalls begging as a physically exhausting and emotionally humiliating experience. Being situated in the social margin, the family is too powerless to pursue other dignifying means of livelihood. In rather exclamatory remarks, Ajin says: «my mom and dad», being mentally ill and visually impaired, «could not make a living. I am the oldest son, but I am just a ten-year-old boy. And we have ten people in the family. How can we survive if we do not beg? [*pha ma gnyis po ni' tsho skyong gi 'jon thang las bral zhing phru gu'i rgan 'go yin pa'i nga ni lo bcu tsam yin*]

¹⁷ Dongjin, *Beggar child*, cit., p. 8.

¹⁸ T.B. Bottomore, *A dictionary of Marxist thought*, London, Blackwell Reference, 1999, p. 45.

¹⁹ M. Karl, *The eighteenth brumaire of Louis Bonaparte*, Last updated: 20.02.2025, <<https://www.marxists.org/archive/marx/works/1852/18th-brumaire>> (last access: 13.03.2025).

²⁰ R. Williams, *Marxism and literature*, Oxford, Oxford University Press, 1977, p. 75.

²¹ B. Headey, R. Muffels, M. Wooden, *Money does not buy happiness: Or does it? A reassessment based on the combined effects of wealth, income and consumption*, «Social Indicators Research», vol. 87, n. 1, 2008, pp. 65-82.

khyim nang mi grangs bcu tsam yod pas lto ma slong tshe ji ltar' tsho dgos sam]»²². Disability, illness, generational poverty, and illiteracy leave beggary as the only available choice for Ajin's family.

Ajin's veracious confession about suffering from poverty in *Beggar Child* challenges the strategic understatement of economic hardship. Poverty affects a person's overall well-being, and essential material well-being matters. Therefore, Ajin's unvarnished narration of presenting material well-being as a pathway to happiness in *Beggar Child* becomes powerful rhetoric because it restores the voice from the grassroots.

4. *Self-help narrative and success*

Self-help stories have been consistently popular in modern society due to the appeal of material success. Modern Tibetan society is not an exception. The Tibetan preface introduces *Beggar Child* as a self-help success story, and the foreword directly reflects the translator's ideas and motivation for translating *Beggar Child*:

«The main character of *Beggar Child* is Lai Dongjin. All the people ridiculed him when he was a young boy. With resilience and hard work, he shows the world that even a beggar can eventually get rid of suffering [*sprang phrug ces pa'i sgrung gtam 'di'i mi sna gtso bo la'e tung cing ni kho pa ni de snga skye bo kun gyis' phya smod bya yul zbig yin kho pas dpa' mi zhum pa'i blo stobs la brten nas 'jig rten thogs gi skye bo tshor gnas lugs 'di 'dra zbig ra sprod bya sa pa ste sprang phrug yin yang sdug bsngal las thar ba'i nyin zbig yod pa de'o]*»²³.

Oxford English Dictionary associates the meaning of success with obtaining something, particularly wealth. According to OED's definition of success, beggars have little money and are thus less successful. However, the mendicancy of orphans becomes an exegesis of success. In self-help stories, an impoverished child often turns out to be the most successful adult. Similarly, the stark contrast between Ajin's childhood and adulthood magnifies the self-help narrative as the contrast makes the level of success tangible. Then, Ajin becomes a signpost for children in terms of surviving and striving according to the self-help logic-induced success.

Beggar Child depicts an emblematic image of success with the elements of a trophy, titles, and applause from the start. In the opening scene, Ajin holds a gold-plated trophy and «even» wins a standing ovation from «the officials» [*dpon rigs rnam kyis kyang rang gnas las ldangs te nga la thal mo sdeb*]

²² Dongjin, *Beggar child*, cit., p. 108.

²³ *Ibid.*, p. XI.

because he has won the title of Top Ten Outstanding Youth²⁴. The wording indicates that Ajin perceives the officials as social elites above him. Ajin's family was impoverished, and now they sit in «honored guest seats» [*sku mgron bzhuks gnas*] as the officials do²⁵.

Ajin, a beggar from an impoverished family, stands on an honorary stage and overlooks the scene of how his family members and government officials converge into the same space, the unexpected convergence of social space between these groups reflects a personal identity shift for him. He recalls his life journey via forty-nine short stories, which develop the storyline through three interrelated matrices: striking poverty, individual efforts, and positive outcomes. *Beggar Child* tells a rather typical zero-to-hero story. It becomes a self-help book in accordance with its bildungsroman plot. Regarding readers' responses, the existing literature on *Beggar Child* almost entirely comes from school children who primarily write about its motivational self-help elements²⁶.

The concept of self-help has been thriving since the Industrial Revolution. The narrative «describes the development of the subjective through industry and perseverance»²⁷. Samuel Smiles became the most well-known speaker of self-help propaganda by creating a corpus of literature: *Self-help* (1859), *Character* (1871), *Thrift* (1875), and *Duty* (1880). Smiles most likely aimed to help the poor lower class who were struggling in a drastically changing society; nevertheless, his books evolved into «a gospel of success» based on «middle-class optimism»²⁸. Instead of presenting information «in the form of abstract, logical argument», the self-help genre persuades «through biographical tales,

²⁴ *Ibid.*, p. 1.

²⁵ *Ibid.*

²⁶ S. Rongjun, «rang guangmang zheshe zai yiqi—du qigai kin a yougan», *zhong xuesheng*, 03(2016):53; transl. *Let Lights Together: A Reading Report on Beggar Child*, School Student; S. Wenjie, «miandui pinqiong—du qigai kin a yougan», *chu zhongzheng youxiu zuowen*, Z1(2005):20-22; transl. *Facing Poverty: A Reading Report on Beggar Child*, Excellent Essays from School Student; Z. Yuanlong, «qigai kin a: yiben cuire fenjin de shu», *zhongguo qingnian*, 12(2004):51; transl. *Beggar Child: A Motivational Book*, China Youth; W. Shoumin, «Chengong bushi ouran weiyu buduan xiangqian», *Zhong xuesheng wangzhan*; transl. *We Should Only Move Forward to Permanent Success*, School Student Website, <<http://163.32.84.93/office/lo/web/library/pieces/HS-composition/1000315/141%E5%90%B3%E5%AE%88%E9%96%94.htm>> (last access: 24.06.2024); X. Xiaoqi, «buxiang mingyun qufu» *dushu xinde qigai kin a*; transl. *No Submissiveness to Destiny, A Reading Report: Beggar Child*; <<http://w3.tkgsh.tn.edu.tw/99c5371/%E8%AE%80%E6%9B%B8%E5%BF%83%E5%BE%97-%E4%B9%9E%E4%B8%90%E5%9B%9D%E4%BB%94.htm>> (last access: 24.06.2024); H. Sijia, «qigai kin a», *shude sili gaozhong*; transl. *Beggar Child*, Shu-Te HC High School, <<http://lib.shute.kh.edu.tw/net-read/shs10003/309b.htm>> (last access: 24.06.2024).

²⁷ C.E. Murray, *Self-help and the helpless subject: Samuel Smiles and biography's objects*, «Nineteenth-Century Literature», vol. 69, n. 4, 2015, p. 482.

²⁸ T.H.E. Travers, *Samuel Smiles and the origins of 'self-help': reform and the New Enlightenment*, «Albion: A Quarterly Journal Concerned with British Studies», vol. 9, 1977, p. 162.

by parables, stories, aphorisms, proverbs»²⁹. Smiles' books are meant to encourage readers to follow their formulas for success: subjects from the lowest social class could potentially repeat the successful mode of others simply by trying hard enough³⁰, Smiles writes about «the efficacy of self-respect and self-reliance in enabling men of even the humblest rank to work out for themselves an honourable competency and a solid reputation»³¹.

The didactic voice in such books is that if the most indigent poor could do it, anybody should be able to do it. But this voice also has an underlying tone: «it is your fault if you are not prosperous»³². It profiles the few successful non-elites, similar to how Asian Americans are upheld despite their race in the U.S. with the term «the model minority»³³. This is part of the myth of considering Asians as the 'better' and more 'successful' minority in a multicultural Western society. On the one hand, such racial positioning dismisses the reality «that not all Asian Americans are successful»³⁴. Also, many Asian immigrants who become the model minority have gone through multiple selective processes. They or their parents are among the few who graduate from top universities in their home countries and the United States with exceptional academic performances. On the other hand, the myth of Asian success aims to dismiss the wrongdoings from a colonial and slavery-filled past by shaming black Americans and blaming «their own deficiencies» for the assumed failure of the black community³⁵.

The self-help genre is problematic since it has contributed to the deterioration of neo-liberalism. Smiles repeatedly writes about «a strong individualism» as the magical pill for the creation of a perfect nation and society in *Self-Help*; however, his praise of the 'individual' who is 'energetic' values only self-benefiting achievements and enhances the narcissism present in the modern world³⁶. Self-help becomes what its creator Smiles denies: «a eulogy of selfishness»³⁷. Self-help stimulates «the selfish pursuit of wealth and status at all costs», especially among the wealthiest group³⁸.

²⁹ K. Fielden, *Samuel Smiles and self-help*, «Victorian Studies», vol. 12, n. 2, 1968, p. 158.

³⁰ *Ibid*, p. 160.

³¹ S. Smiles, *Self-help: with illustrations of characters, conduct, and perseverance*, New York, Harper & Brothers, 1871, p. 27.

³² Fielden, *Samuel Smiles and self-help*, cit., p. 161.

³³ C.J. Kim, *The racial triangulation of Asian Americans*, «Politics & Society», vol. 27, n. 1, 1999, p. 108.

³⁴ C. Shih-Wen Sue, L. Sin Wen, *Good Chinese girls and the model minority: race, education, and community*, in *Girl in Translation and Front Desk*, «Children's Literature in Education», vol. 52, 2020, p. 2.

³⁵ Kim, *The racial triangulation of Asian Americans*, cit., p. 118.

³⁶ Smiles, *Self-help: with illustrations of characters, conduct, and perseverance*, cit., pp. 18, 20, 22.

³⁷ *Ibid*, p. III.

³⁸ A. Kearney, *Thomas Hardy and Samuel Smiles: biography, fiction and the self-help debate*, «The Hardy Society Journal», vol. 1, n. 1, 2005, p. 33.

Since self-help values individual interests, it protects privileged individuals and powerful institutions more. As a result, self-help addresses the systematic inequalities of society with the seemingly fairest but utterly Janus-faced story: anybody can make it if one just works hard enough. The reality is that success belongs to the few. Self-help benefits the elites because it ensures an exploitative yet solidified social structure with submissive and self-blaming people.

Ajin explicitly writes about such a psychological process. He is perplexed by how his father never praised him for his academic achievements while repeatedly boasting that the then-two-year-old Ajin walked around forty kilometres for beggary. Though Ajin considers this forty-kilometre-trip as a «very sad-denning incident» [*shin tu yid skyo ba zbig*] for a two-year-old, he tries to make sense of it by painfully justifying the contrast between hierarchy and poverty as normal³⁹. *Beggar Child* records the process of Ajin's passive acceptance of social inequality as he writes: «I don't know why my father praises such a thing, but after careful consideration, I think children from wealthy families are good at calculating and managing wealth; officials' children are good at singing, dancing, and establishing connections; so maybe we child beggars must have strength and endurance. [*khong gis don der bsngags brjod gnang dgos don ngas ma shes yin na'ang bsam blo zhib phra btang na phyug bdag gi phru gu ni rtsis la mkhas shing tshong dang rgyu nor do dam byed thub pa dang dpon po'i phru gu ni glu dang gar la mkhas shing 'bril lam 'dzugs mkhas pa yul gyar slong mo ba'i phru gur nges par du rkang shed dang thegs nus yod dgos pa de ma yin nam*]»⁴⁰.

The compound experience and trauma in *Beggar Child* significantly shape how Ajin presents himself, others, and society. From a young age, Ajin is aware of his family's situation. Nonetheless, the narrator and character of *Beggar Child*, Ajin, successfully attain social elevation. According to the self-help narrative, the successful outcome makes all the pain and suffering a 'valuable' experience.

As has been illustrated in the first section of the paper, patriarchy, sexism, and resultant violence are the most apparent injustices in *Beggar Child*. However, this injustice remains socially normalized and systematically invisible for the writer, translators, and publishers of *Beggar Child*. In reverse, the self-help success narrative has been popular because it sells wish-fulfilment in the name of justice.

³⁹ Dongjin, *Beggar child*, cit., p. 7.

⁴⁰ *Ibid.*

5. *Justice in carnival gross-out and laughter*

People long for a just world where hard work pays off, and this hope for justice and equity stands behind the motivation of translating *Beggar Child*. In addition to self-help, the longing for justice and equity is embodied through carnivalesque in *Beggar Child*. Carnival celebrates a temporary equal state among all, allowing the occurrence of different expressions. With the established binary line between what is allowed and what is not, thick and heavy artistic forms such as grotesques have become a way of being carnival. The blurring of lines breaks hierarchy and achieves equality. *Beggar Child* retains multiple vivid descriptions of gross-out scenes which form carnivalesque.

In addition to writing about poverty, Ajin unapologetically describes physical impairments, human faeces, and spoiled food in *Beggar Child*. Ajin writes back to the elites as the gross-out elements overturn «the elegance of letters». Notably, Chinese literati often pursue «the elegance of letters» [*wenya*] in writing: «a tradition that celebrates refined tastes in literature, arts, and the landscape»⁴¹. The mode of elegance is a way of writing about disability and the grotesque through avoidance, metaphor, and the attachment of moral implications. In comparison, Ajin creates the Bakhtinian carnivalesque by writing urine, faeces, and flatulence into the novel, especially in the seventh, eighth, and fourteenth chapters of *Beggar Child*.

Mikhail Bakhtin writes about carnivalesque in *Rabelais and His World*⁴². Bakhtin initiates the concept by analyzing carnival, a celebration that features joy and crossover in medieval European culture. Carnivalesque stands against the solemnness and infrangibility of the medieval European church. The authoritative church is serious, but carnivalesque is festive, accessible, authentic, and joyous. The church has the agency to represent «elegance» when the standard of aesthetics is hierarchical; then, carnivalesque expression is often achieved through «grotesque realism»⁴³. Eccentricity and exaggeration are features of grotesque realism that radically challenge normalized beauty standards. Thus, grotesque realism often reminds people about uncomfortable and unjust parts of human life.

Along with four other books which «have rocked the book market» [*hongdong le shushi*], *Beggar Child* has been labelled by Li Ruiteng as popular literature [*tongsu wenxue*]⁴⁴. The Chinese word *tongsu* often collocates lexically into *putong* ordinary and *suqi* vulgar. However, Ajin pushes elegant writing

⁴¹ Q. Peipei, *Aesthetic of unconventionality: Fūryū in Ikkyū's poetry*, «Japanese Language and Literature», vol. 35, n. 2, 2001, p. 138.

⁴² M. Bakhtin, *Rabelais and his world*, transl. by Helene Iswolsky, Bloomington, Indiana University Press, 1984, p. 10.

⁴³ *Ibid*, p. 18.

⁴⁴ L. Ruiteng, «Taiwan *tongsu wenxue* luelun disanjie *tongsu wenxue yu yazheng wenxue yantaohui lunwenji*», vol. 7, 2002, p. 345.

to the opposite end since the homeless child's reality is full of anxiety as he searches for a place to defecate or is constantly aware of bearing odour in a crowded space. The carnivalesque subverts «the usual state of cultural affairs» by yielding precedence to «a non-standard, minority view of the world»⁴⁵.

Moreover, Ajin laughs at those supposedly embarrassing moments, subtly yet powerfully challenging the authority. In the article «The Laugh of Medusa», Hélène Cixous interprets laughter from women as positively destructive. Cixous metaphorizes the Medusa as the powerful embodiment of women. Cixous writes: «If she's a her-she, it's to smash everything, to shatter the framework of institutions, to blow up the law, to break up the 'truth' with laughter» (888 translated from French to English by Cohens)⁴⁶.

Children are the group of people who frequently execute a carnivalesque rebellion. Most children laugh at things that adults consider silly or inappropriate. When parenting and educating, adults are often the authoritative figure. In the face of a top-down request discouraging scatological words, children's laughs amuse, embarrass, or even anger the alleged authority when children purposely repeat those less graceful words. John McKenzie puts forward a connection between «children's laughter» and «scatological humour» based on Klor's writing below: «What makes kids laugh? The broadest, silliest types of humor-silly words and sounds, particularly ones related to the human body, incongruous actions, exaggerations, and spoofs. Ever said the word 'underwear' in front of a group of kids? Don't try it with a straight face!»⁴⁷. Words about excrement become a social taboo, especially in public and professional spaces. While adults are training children, laughter from children essentially breaks the taboo.

Children's interest and excitement in discouraged words becomes «scatological children's humour», which «turn[s] the established order upside down and reveal[s] what is normally hidden and not spoken about»; also, it becomes «social communication» which «connects children with the older generation»⁴⁸. With explicit scatological words and scenes in *Beggar Child*, the child protagonist Ajin joins those children who create «carnival laughter»:

«It is, first of all, a festive laughter. Therefore, it is not an individual reaction to some isolated 'comic' event. Carnival laughter is the laughter of all the people. Second, it is universal in scope; it is directed at all and everyone, in-

⁴⁵ P. Eyre, *Deafened by laughter: reading David Lodge's deaf sentence as a carnivalesque dismodernist text*, «Journal of Literary & Cultural Disability Studies», vol. 6, n.1, 2012, p. 20.

⁴⁶ H. Cixous, K. Cohen, P. Cohen, *The laugh of the Medusa*, «Signs: Journal of Women in Culture and Society», vol. 1, n. 4, 1976, p. 888.

⁴⁷ J. McKenzie, *Bums, poos and wees: carnivalesque spaces in the picture books of early childhood. Or, has literature gone to the dogs?*, «English Teaching: Practice A Critique», vol. 4, n. 1, 2005, pp. 81-94.

⁴⁸ S. van der Geest, *Scatological children's humour: notes from the Netherlands and anywhere*, «Etnofoor», vol. 28, n. 1, 2016, pp. 127-140.

cluding the carnival's participants. The entire world is seen in its droll aspect, in its gay relativity. Third, the laughter is ambivalent; it is gay, triumphant, and at the same time mocking, deriding. It asserts and denies, it buries and revives»⁴⁹.

With a laugh, children expand their space by making adults discuss scatological words. Articles such as «Why Are Kids So Obsessed with Poop Jokes?», «Why Kids Like to Say 'Poo', 'Wee', and 'Bum'», and «Tom and Dougie's Top 10 Poop Stories for Children» have appeared in media such as «The New York Times», the *BBC*, and «The Guardian». Children's laughs also influence adults and children's book writers to write Children's Choice Award-winning books such as *Why Do Dogs Sniff Bottoms?*

Beyond children's rebellion, the issue of «pees» and «poos» also indicates social problems. I acknowledge the importance of hygiene and health. However, people's responses to hygiene matters reflect a narrative of power, discrimination, and marginalization. The odour and the bacteria of waste are undoubtedly unpleasant, but they are becoming increasingly repugnant in the modern world. Naturally, the ability to limit the presence of faeces indicates the level of modernization. Dirty toilets are associated with the image of developing countries and rural areas, and it has become common to use flushing toilets, chemical fragrances, and even a code of language to avoid pees and poos to the greatest extent.

The chapter «Fake Beggars» [*sprang po*] in *Beggar Child* includes a carnivalesque story relating to excrement. Ajin cannot find any toilets while his stomach aches. When he is squatting on a farm to release himself, he sees the farmer approaching him. Ajin then hurriedly picks up a stone, «wipes his butt», and runs away [*rkub phyis tsam byas*]⁵⁰. He repeatedly apologizes to the angry farmer and gets scared and decides to clean the site since the farmer is still yelling at him. Then Ajin puts his «excrement into the bowl» [*gtsog pa de phor pa'i nang blugs*], which he carries for food begging⁵¹. Though Ajin washed the bowl clean in a river afterwards, he can still sense «the faecal smell in the air» [*mkha' rlung khrod du da dung btsog dri zbig 'thul*]⁵². Ajin is «shivering out of hunger» [*grod khog ltogs nas lus po yongs 'dar gsig rgyag gi 'dug*] after restoring his calmness. Then he forgets about the faeces incident and wears the bowl on his hat while walking and thinking about food⁵³.

In chapter seven, after several doughs of excrement dropped off the ragged trousers of Ajin's younger brother, the whole family, especially his mother, «doubled up with laughter» [*gzugs po yang kyog kyog bzos nas gad mo gad*]

⁴⁹ Bakhtin, *Rabelais and his world*, cit., pp. 11-12.

⁵⁰ Dongjin, *Beggar child*, cit., p. 31.

⁵¹ *Ibid.*, p. 31.

⁵² *Ibid.*

⁵³ *Ibid.*

while covering their noses⁵⁴. In the fourteenth chapter, «Nauseating Midnight» [*mtshan dgung gi dri chen*], Ajin pretends to be asleep while his father asks for directions; Ajin is scared of walking across the graveyard. Thus, his father's diarrhoea turns the chapter into a noisome carnivalesque. As one of those laughing children, Ajin challenges the authority of the elites by over-throwing elegant writing; also, he exchanges ideas with others by showing a lifestyle unknown to the elites.

Meeting the primary demand for material needs is so pressing that food shortage becomes a grotesquely prominent horror in Ajin's life. Before Ajin's adulthood, he had encountered numerous horrendous and saddening stories caused by food shortages. The eighteenth chapter of *Beggar Child* offers one example, which is titled «eat bugs so that we live» [*'bu srin bza' ba 'tsho gnas kyi phyir yin*]; it depicts the ruthlessness of hunger with many gross-out elements⁵⁵. Ajin recalls the embarrassing «stinky sour smell» [*skyur dri*] of leftovers three times throughout the novel⁵⁶. He also writes a gory and detailed description of how his father cooks a half-rotten chicken for the family. Ajin's father cuts the rotten parts from the chicken and asks Ajin to throw them away. The nausea-inducing smell stays in his memory as Ajin feels that «the smell still lingers even though I washed my hands like a hundred times» [*lag pa chus thengs brgya phrag bkrus kyang da dung dri ngan 'thul ba lta bur snang*]⁵⁷.

Once, Ajin's father ate a piece of marinated pork with maggots. As a response to Ajin and his sister's shocking expression, the father says: «I won't die because I eat worms; I will survive instead» [*'bu bzas na shi rgyu las ltog te 'bu bzas na 'tsho gnas byed thub*]⁵⁸. Ajin's family survives the harsh conditions with much compromise and laughs, optimistic yet saddening. Yet, the lack of shelter is one of the worst plights for Ajin.

Conclusion

This paper reads *Beggar Child* in detail to understand the role of social context in translation. Why do translators and editors choose specific texts? Why are some controversial materials translated and published for children? This paper contextualizes the reasons that underline the translation by mainly analyzing how *Beggar Child* speaks the popular story. The content of *Beg-*

⁵⁴ *Ibid.*, p. 23.

⁵⁵ *Ibid.*, p. 69.

⁵⁶ *Ibid.*, pp. 13, 15, 72.

⁵⁷ *Ibid.*, p. 71.

⁵⁸ *Ibid.*, p. 72.

gar Child echoes an extensively pursued narrative: to be rich and successful with hard work. There is an overlapping between societal Zeitgeist and source texts' information. The desire to make the Tibetan version of *Beggar Child* seems set upon a longing for justice and equity. Yet, in *Beggar Child*, ways of expressing equality are opposing. One is the problematic self-help narrative, and the other is the carnivalesque concept.

Beggar Child contains an unfair depiction of girls and women. In the first part, this paper briefly introduces how patriarchy and sexism continue to exist as a norm in *Beggar Child*. However, while translating, problems of sexism and patriarchy have been forgotten with the zest for secular success. To present the basis of translating *Beggar Child*, the second part of this paper provides an outlook on materialism in Tibetan society. This paper depicts a more comprehensive Tibetan material world by translating sections of the Tibetan pop song *Joke*. Then, regarding the Tibetan version, the reasons for publishing *Beggar Child* come down to the appeal of success and the portrayal of hardship. According to the success narrative, hardship becomes a unique but indispensable path that eventually leads to success. The third section of the paper analyses writings of Ajin's hardship in *Beggar Child*. The novel solidifies a connection between materials and well-being. The connection is justified from a Marxist lens, specifically from the frame of the base and the superstructure. Excessive materials might not provide happiness, but there is much truth and justice in reaching overall well-being and obtaining daily necessities.

The fourth section of this paper writes about how *Beggar Child* constructs an appealing self-help narrative. In a modern society, the zero-to-hero self-help story has become increasingly popular. Stories of wealthy and successful people attract much attention. Self-help success stories turn into fairy tales for young adults, though self-help stories rarely promote equality. The scholar Tse wang tso regards the educational function of the *Beggar Child* as the key⁵⁹. Similarly, translators and editors want to educate the younger generation about poverty, misery, and resilience.

In the meantime, *Beggar Child* shows justice using scatological words. In the fifth section, the authors of this paper state that gross-out scenes and rebellious laughter construct the embodiment of temporary equity and justice – carnivalesque. Gross-out elements and scatological words are not binarily and simply bad; they can be read from the aspect of Bakhtin's carnivalesque. In addition to momentary freedom and ecstasy, they function as a humorous communication bridge that narrows generation gaps.

While understanding the motivation of translation, it seems that the popular narrative in society plays a critical role. In the case of *Beggar Child*, a longing for justice swayed the translation of *Beggar Child*. And the pursuit of

⁵⁹ T. Wang Tso, *An analysis on the translated Tibetan novel: Beggar Child*, «Tibet University Journal (the Tibetan language version)», vol. 1, 2016, p. 111.

justice has been concretized through themes such as hardship, material importance, self-help, and carnivalesque. These themes derive from the question of how we define success in a society. A longing for a better future yet a complicated understanding of success might have made a Tibetan version of *Beggar Child*.

Starting from a leibnizian unpublished writing. Interpretation and educational proposal by Umberto Margiotta*

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ABSTRACT: This article is about the analysis and translation of an unpublished Leibniz by Umberto Margiotta. It is a little-known text but of great importance not only from the point of view of the history of education but also from that of the epistemology of training. The interest in Margiotta's work on the Leibnizian *Confession* is born in relation to its hermeneutic key: an epistemological formative, which opens up spaces for reflection on the educational question of the present in comparison with the strategic gaze of one of the most original thinkers of Modernity. In the mid-eighties of the last century, the Italian scholar dedicated himself to the translation (from Latin) and interpretation of the short writing of the German philosopher and scientist to emphasize the emergence, in the dialogic form of the text, of the necessity of the Method. Educational research needs, to be effective, logical foundations that also assume an ethical value, since they outline the role of the human being in the order of the universe and place him in a position to choose and decide on the direction of his *probable* action. Hence the deep sense of *responsibility* that freedom has its *raison d'être*, a wonderful synthesis of Leibniz's lesson on the meaning of the human in its essential relationship with the divine.

EET/TEE KEYWORDS: Leibniz; Umberto Margiotta; Responsibility; Educational proposal; XX Century.

* Attributions: The paragraphs 1 and 2 are written by Anita Gramigna; the paragraphs 3 and 4 are written by Camilla Boschi.

1. *Introduction. Freedom and responsibility*

It may seem unusual today to publish in the mid-eighties of the twentieth century the translation of an unpublished by Leibniz, supporting its current relevance. Yet Umberto Margiotta is on this line, considering it «a useful provocation for that vast and increasingly transdisciplinary field which is the pedagogical research»¹. First of all, it is interesting to look at the trans-disciplinarity of a knowledge that needs continuity in research, also thanks to «a work of genetic reconstruction and epistemological uncovering of the concept of educational space»². It is known that the Italian scholar strongly supported the need for a History of the Method, and in the *Confessio* he precisely sees three relevant arguments in relation to the educational problems of contemporaneity. The first is the *problem of peace*, which is anguishing our present in front of a destructive madness we had lost the memory in our Continent. The second argument explores a significant question: *the problem of the relationship between freedom and ideology in terms of responsibility*, while the third puts the emphasis on the possibility of secularism even in reflection about the divine and its creative work. The *Confessio*, which recalls the Augustinian spirit of the search for truth, is not by chance the dialogue between a philosopher and a theologian.

The Italian interpreter and translator considers that «a work of ideological purification of opposing truths and beliefs»³, that it must find in the educational process a common strategy of commitment and responsibility. The Irenism of the Sixteenth and Seventeenth centuries – in this last Leibniz was an authoritative representative – felt a shortage that can be found even in the present time: the lack of a *conventional alphabet* which made it possible to understand different languages and to compare different sensitivities, which were nevertheless aimed at achieving peace. Certainly, the proposal of the German philosopher for a logical conventionality may seem ineffective today, which would be universally acceptable on the basis of the rationally incontrovertible proof. The question is particularly about «rational controllability of the relationship between ideology and freedom in man, (...)»⁴. Leibniz's modernity lies in the awareness of the moral drama that confronts us with the uncertainty of existence and, therefore, the only chance seems to be offered by action. The educational probability suggests Margiotta, «able to regenerate and translate, by dialectic ascended, the personal human and moral experience in concepts, in observation procedures, in visible ends, in values of coexistence

¹ G.W. Leibniz, *Confessio Philosophi*, ed. by U. Margiotta, Venezia, Cafoscarina, 1985, p. XI.

² *Ibid.*

³ *Ibid.*

⁴ *Ibid.*, p. XII.

and intersubjective communication»⁵. The argument seems to us of great interest in that it argues for the possibility of a transition from life experience to the order of methodological tools and the guide of ethics: «the Leibniz logic lesson is essential for a reconstruction of the problem of responsibility as central to the research programme of the basic pedagogy»⁶. The latter, in the Leibniz perspective, represents a questioning of the object itself of educational Knowledge, its birth and evolution: «In the plurality of points of view, the *method of pedagogy* is originally thought up, and is now critically proposed as a *method of complexity*, In short, as a fundamental route for mastering the continuous adjustments that must be made to partial disciplinary syntheses in Knowledge and conduct of man»⁷. We are struck by the methodological leap in the direction of complexity, a provocative leap, aimed at reminding *disciplinary syntheses* that do not represent an absolute or a hierarchical primacy but a significant part of the whole, according to that view of the universal order on which in particular the most intransigent scientists could dwell doubtfully: «(...) it is unreasonable to introduce a sovereign intelligence that orders things and then, instead of resorting to its wisdom, use the properties of matter to explain phenomena»⁸. For the Italian education philosopher Leibniz is a *mentor*, particularly within a century – the Seventeenth century – crucial to trace the roots of the *basic* pedagogy of our time.

For Leibniz, freedom is an indispensable condition of self-determination, in an anti-mechanistic perspective that translates into *responsibility*. An element of extraordinary interest in that implies continuity of commitment in the choices and orientations. Margiotta points out that in the present we recognize freedom and responsibility not so much in concepts, but in concrete *values* that connote lived experience. However, the logical imprint suggested by the German philosopher «is suggestive because it reanimates, in the very heart of freedom and responsibility, the essentiality to it of the educational problem as a problem of rules and method»⁹. The method, constant reference point of the Italian scholar, must be framed in its educational *essential* at the very heart of freedom and responsibility. The probability, category to which we have referred, is always intersubjective, it is not acquired with experience but is an exercise of probable action that translates into «art of analysis»¹⁰; but, warns our epistemologist, «Any synthesis (of experience, education, knowledge) as far as it can make us discover wonderful truths, in cases where it cannot use the method of exclusions, must take from analysis the guiding thread. So,

⁵ *Ibid.*, pp. XIV-XV.

⁶ *Ibid.*, p. XV.

⁷ *Ibid.*, p. XLVII.

⁸ G.W. Leibniz, *Discorsi di Metafisica*, in *Scritti filosofici*, ed. by D.O. Bianca, Torino, UTET, 1988, Vol. I, p. 87.

⁹ Leibniz, *Confessio Philosophi*, cit., p. XIV.

¹⁰ *Id.*, *Nuovi Saggi*, IV, 2, in *Scritti filosofici*, Torino, UTET, 1967, p. 114.

there will be no ethical experience, no values, no intention without logic»¹¹. It seems important to clarify what is meant by the method of exclusions, starting from the difference that the German philosopher makes between *truth of reason* and *truth of fact*. The first, based on formal logic, presents a condition of necessity, therefore according to the principle of non-contradiction exclude, for example, that a proposition can be both true and false. The *truths of fact*, inherent in the actual reality, are not subject to the principles of formal logic, therefore their opposite is possible and, nevertheless, they are based on the principle of *sufficient reason*, whose causality is not necessitating but contingent, or such that the subject has sufficient Knowledge of a thing, so that he can explain its condition of existence. On the educational level, it is of the utmost importance to grasp the differences between the two strategic models of thinking.

Anyone who intends – pedagogue, researcher, education epistemologist – to follow a training project based on responsibility, will have to undertake studies of logic: «the normative character of logic determines, in fact, the meeting point of ethical problems and gnoseological problems, pragmatics, semantics and rhetoric»¹². The foundation of pedagogical research will consist (Margiotta uses the verb to the future) in the identification of the logical *preconditions*, beyond the descriptive modalities of the educational fact. The logic of education is aimed at making intelligible, although on a plane of abstractions, what supports educational choices, as well as describing the development of the educational fact, in so far as it is *observable, cognitive, determined*, by checking the logical consistency of the design hypothesis. It is now a question of understanding why the interpreter in front of the *universal* mind of a thinker who has ranged from jurisprudence to history, from theology to politics, from mathematics to physics, to philosophy, he concentrated on a short essay in dialogic form on the theme of *human freedom* and *divine justice*. A hint of response is evident in the perspective of its methodological interest, in relation to the world of education, but it may be useful to consider the way in which Margiotta investigates the *structure* of the *Confessio* to grasp its suggestive elements.

In the first of the three parts of the dialogue the subject is the justice of God but, in particular, Margiotta emphasizes the basic concepts that are identified by the author to give continuity to the arguments *in itinere*; it is *necessary, contingent, possible* and of the two verbs *to allow* and *to want*. God cannot be the moral cause of sin, but physical cause, therefore it is indispensable to rigorously establish the freedom of man, who is morally responsible for sin: « The originality of the work is in this continuous call by Leibniz to the concreteness of human life, whose existence can be rationally understood but nev-

¹¹ Leibniz, *Confessio Philosophi*, cit., p. XV.

¹² *Ibid.*

er predictable»¹³. Every individual life is in a condition of dependence on the growth of the subject, on the context and on the time when it takes shape. The German thinker introduces the word *series* with a significant specificity, which is identified in the process and rhythm of cosmic life in which human beings are involved in their personal peculiarity. Another important matter is the rigorous development of the principle of sufficient reason, which is no longer as originally an expression of critical mode addressed to mechanical reason, in fact unusable in the understanding of human phenomena, but «taken as the whole of the requirements of existence»¹⁴. Finally, a characterization of the human subject emerges that goes beyond the concept of *globality*, previously argued, as a concrete existence in its entirety. Here «man is identified by virtue of the order he occupies in the universe»¹⁵; his freedom is characterized by the *here* and *now*, and it is in this context that he must give direction to his own existence. In reflecting on the structure of the work, Margiotta does not fail to grasp once again the formative scope that, on the one hand, refers to the educational culture of the Sixteenth century and the Medieval work of Raymond Lullo: *Ars compendiosa inveniendi veritatem seu ars magna et maior* (1274); on the other hand, it penetrates with radical depth of ethical character into the themes of the *Reformed Christian theodicy* (freedom and predestination).

2. *The Irenic movement and the reconciliation production*

The dialogue in question, in the intention of the author, wants to support the possibility of agreement between Reason and Revelation, based in particular on the «natural theology» of the time and leaving little space for the ‘revealed truth’. The central thesis of the *pre-established harmony* allows Leibniz to identify an identity continuity between God and man, made «in his image» and, thanks to this, «(...) justice as reason and truth are one and the same in God and among men, however freely and distinctly they are according to all the differences of degree that separate the one from the other»¹⁶.

The writing, in Latin, can be dated to 1673 or shortly before and it is relevant to consider that the philosopher of Leipzig had known in 1671 the baron von Boineburg, a leading figure of the Irenic movement which spreads in Central Europe between the different courts, with the aim of overcoming the disturbing religious wars between Christians through a reconciliation between the churches. The baron, among other things, favored Leibniz’s role as advisor

¹³ *Ibid.*, p. XIX.

¹⁴ *Ibid.*, p. XXI.

¹⁵ *Ibid.*

¹⁶ *Ibid.*, p. XVIII.

to the elector of Mainz and the philosopher applied for a role of mediation and arbitration between Protestants and Catholics. Hence the desire to develop a theodicy capable of supporting *methods of meeting* aimed at facilitating discussion between differences animated by the common will to meet: « The fundamental themes of human coexistence, and especially the themes of human freedom and justice of God are treated with formal mathematical deductive rigor [...]»¹⁷.

The opportunity in 1672 to go on a diplomatic mission to the court of Louis XIV, to prevent the invasion of Holland, allowed the scholar prolific contact with philosophers and mathematicians, so much so that he was induced to write important works in French. Consequently, he was oriented to «propose a model of certainty, regarding the most densely problematic themes of the time (the problem of God's justice, predestination, human freedom»¹⁸. What is certainty? In general, one could say a mathematical approach to problems that generated wide-ranging doubts in the culture of the time, especially with the entry into crisis of the so-called «Republic of Letters», of broad scope in the Renaissance, the progressive abandonment of the cognitive structures of Platonic and neo-Platonic matrix. Margiotta sees in that «Repubblica» and its encyclopedias, qualifying elements on the level of education, in particular the «cultivation of character through learning»¹⁹, without neglecting a new hermeneutic of the Aristotelian psychology thanks to the development of an empirical approach, in the late Renaissance, aimed at identifying in the *affections* the cognitive starting point that «ended in the formation of practical wisdom, through the promotion, in the student, of the *ingenium*»²⁰. The Italian scholar cites Juan Vives and his learning psychology. The Spanish intellectual of the sixteenth century had prepared three salient elements of the method, *doctrina*, *disciplina* and *ingenium*, and in *De Ratione Discendi*²¹ he stressed that education should provide continuity sense-feeling, knowledge-understanding, up to solid character formation.

A widely debated theme of how evil is analysed from different perspectives, during the Seventeenth century, reveals the relationship «of interconnection that was thought to be discovered between the concepts of method, order and harmony»²². The *evil* has been mentioned because it is not lacking in originality to highlight its positive nature, both in the natural and moral environment, when one finds oneself having to “justify” destructive evils such as the earthquake of Lisbon, the plague, the wars. On the other hand, sin is insidious and contaminates the very *kingdom of grace*; the philosopher observes consistently

¹⁷ *Ibid.*, p. XXVIII.

¹⁸ *Ibid.*

¹⁹ *Ibid.*, p. XXX.

²⁰ *Ibid.*

²¹ Cf. J. Vives, *De ratione dicendi. La retorica*, testo latino, Napoli, La Città del Sole, 2002.

²² *Ibid.*, p. XXIX.

in his *Confessio*: «Even if God is indeed the cause, he is not however the author of sins, and, if I am allowed to speak scholastically, I would say: *the ultimate physical cause of sins* (as of all creatures) is God, the moral cause is in the sinner»²³.

But, on the basis of scientific investigation, can evil be reduced to human sins? In fact, we are moving far away in discussions and debates from the vision of the Old Testament, tending to agglomerate the evils in general, including natural ones, in the original sin. This detachment is due mainly to mechanistic, logical and mathematical positions. Certainly, there was a specific attention to identify in the corrupt human nature the spread of moral evil, also because in the reformed theology frequently reference was made to the goodness of nature to underline its lack in the human subject. This *ecological* vision of natural balance did not derive from the *Scriptures* but from Platonic harmony, while there was a scientific orientation aimed at supporting the condition of natural neutrality both in relation to good and evil. In the theological circles and university faculties of Central and Northern Europe a historical theory of divine revelation, and of possible salvation, based on a succession of pacts between God and men, spread: «In this way history became an exemplary ground of the struggle between God and evil: the kingdom of grace would conquer the world only when men had increased to such a point the natural light of reason, that it assured victory»²⁴.

The breadth of the debate on the rooting of evil in history, and for some even in nature, led us to consider how the kingdom of grace could be made feasible, also through political choices and organizational modalities of civil society. It is in this perspective, also considering the disarray of the thirty years' war, that religious reconciliation was promoted, according to a clear educational mark oriented towards universal peace. Much was done, and not only by Leibniz, to encourage a general agreement on articles of faith and reason to share. Margiotta emphasizes the commitment of Ugo Grozio in order to identify a theological basis for pacification, considering his role as jurisconsult, among the first to support the natural law: for him the natural law is the product of human reason, which is able to distinguish between good and evil. The interlocutors of the *Confessio* present a profile built *ad hoc* to address the identified topics: the *catechumenal philosopher* (sometimes called *epistemon*) and the *catechist theologian*. Only in appearance should one learn and the other teach, since there is no normal master-student asymmetry. Moreover, the figure of the theologian, Margiotta reminds us, finds a precise reference in the person of the Danish bishop Nicolaus Steno, famous naturalist of the time, with whom Leibniz discussed the text in question, identifying elements for comparison with Cartesian thought. The two did not get along and polemized:

²³ *Ibid.*, p. 12.

²⁴ *Ibid.*, p. XXXV.

«In short, Steno was for Leibniz a *spiritualist* who, despite his past as a naturalist, did not intend to mix mathematics with metaphysics, nor compare faith with reason»²⁵. In essence there is an opposite way of dealing with the great religious and philosophical problems of the time.

3. *Ars inveniendi and pedagogy*

Leibniz's attention to the quoted *Ars inveniendi* of Lullo is deep and can represent one of the elements that caused silence on his thought between Eighteenth and Nineteenth century, as Margiotta also reminds us, we seem to be able to say with a pinch of irony, fascinated by the theme given the constant epistemological passion. We start from a well-known definition: «The term *clavis universalis* was used, between the Sixteenth and Seventeenth centuries, to indicate that method or that general science which place man in a position to grasp, beyond the phenomenal appearances, or the *shadows of ideas*, the ideal structure or texture that constitutes the essence of reality»²⁶. From the middle of the Fourteenth century until the end of the seventeenth, the topics dealt with by Lullo in the Middle Ages were expanded in various directions: language, memory, philosophy, the sign-image relationship, etc. Projects aimed at updating research in the fields of logic and rhetoric, orienting analysis «[...] to classifications, signs and hieroglyphics, symbols and images» (Ibidem). Generations of scholars followed one another in the investigation of this *ars magna*, which elaborated rules relating to the study of memory, speech, argumentation and persuasion, until «to teach the type of connection that must exist between the places of mnemotechnique and the *images* that have to be placed in them to study the great art of Lullo, to elaborate the complicated rules of combinatorics [...]»²⁷. Many may be led to see a link with current information communication technology, but the radical difference in context should be carefully considered.

Referring to the dialogue, not easy and sometimes even scathing, between Leibniz and Bishop Steno, Margiotta synthesizes an important question: Steno, like other intellectuals of the time, could understand the positions of the philosopher of Leipzig but not *justify* them. The unacceptable, in the correspondence of diffuse signals, is the “methodological paradigm” that tries to juxtapose as in a mosaic the local investigations of various disciplines within a «Reliable global rationality in relation to the system of science and the com-

²⁵ *Ibid.*, p. XXXVIII.

²⁶ P. Rossi, *Clavis Universalis. Arti mnemoniche e logica combinatoria da Lullo a Leibniz*, Bologna, il Mulino, 1983, p. 12.

²⁷ *Ibid.*, p. 18.

munication itself between disciplines»²⁸. The understandable mistrust was directed towards the *universal and cosmic justification* of innovation processes in Knowledge in the most disparate fields, despite the ambiguities and sometimes confused choices, which had an effect on both research and social life. The defense of the Italian scholar should be reported with a quotation full of meaning, which lends itself to some consideration: «And of Leibniz, perhaps, what seems to us instead constitutes the emblematic figure of his research: not so much that of the metaphysical or logistical foundation of an organic universe, but rather, *the demonstration of the existence (and communication) of universes of experience, discourse and research among them compossibles*»²⁹. Margiotta does not express a certainty, but a doubt about a misunderstanding related to the cultural environment and its conservative tension. What matters most, in his opinion, is not the metaphysical construction of the monadistic universe, but the discovery – we like the term here, although questionable – of *universes of experience* that communicate with each other, just as in studies on the complexity of the contemporary world. It is not surprising, then, that, about a century after the publication of the *Dissertatio de arte combinatoria*, Kant «radically excluded that the composed ideas protected to be represented by the combination of signs and compared Leibniz's characteristic to the inconclusive dreams of alchemy»³⁰.

The timeless charm of *ars inveniendi* lies, however, in the propensity to the new and the unknown, given a well-established practice that is exercised on the *relations of method*; utopia, however, emerges from the conviction that the logical-demonstrative concatenation «an unambiguous and adequate intra-theoretical and trans-disciplinary communication»³¹. We are reminded that the youthful interest in combinatorial art was sustained by a platonic-pythagorean worldview, just as mathematical research was oriented to the metaphysical-theological dimension³², to emphasize the intrinsic originality of the thinker. By virtue of this, even when its synthesis appears partial they are still courageous and represent a framework of educational reference of great depth: «that which is related to the recognition of a characteristic need of man, who not only invents the forms of historical experience, theoretical and practical, but reflects on them and their activities, asking for their possibility and meaning, and questioning their effectiveness and transmissibility»³³.

²⁸ Leibniz, *Confessio Philosophi*, cit., p. XXXIX.

²⁹ *Ibid.*

³⁰ Rossi, *Clavis Universalis. Arti mnemoniche e logica combinatoria da Lullo a Leibniz*, cit., p. 22.

³¹ Leibniz, *Confessio Philosophi*, cit., p. XL.

³² F. Barone, *Logica Formale e Logica Trascendentale*, Milano, Unicopli, 2005, p. 62.

³³ *Ibid.*

Conclusion

It could be generalized that each of us is in a position to prepare ‘syntheses’ of his life history that assume self-formative value; but the Knowledge of education can and must take us beyond the *invention* of forms of experience, towards that reflection of nuances which is the result of the *method*. And, speaking of method, the Leibnizian perspective of *ars inveniendi* is characterized by the rejection of the Cartesian ideal of observer neutrality, opposing it to an epistemological position built on «Awareness of the reducible multiplicity of points of view and observers»³⁴. For the German philosopher, it is indispensable to propose an *ars* capable of constructing “simple terms” but effective and “elementary concepts” but appropriate to the purpose, also thanks to simplifying combinations, both in language and thought. Even more relevant is the commitment to the direction of a universal writing, which can be understood by all and structured in order to contain within itself the knowledge related to the indispensable things: «Leibniz, the illustrious continuator of the Lullian and Comenian pansofico encyclopaedia, aims ultimately, with extreme pedagogical vigour, to find a language»³⁵ that possesses simultaneously the *art of discovering* and the *art of judging*. The linguistic signs, like the algebraic signs, represent a divine gift and yet are faint traces of a darker mystery.

Leibniziana’s deterministic morality is also founded on logical and metaphysical bases: «The principle of sufficient reason in fact introduces, in ethics, the principle of contingency»³⁶ and we already know its difference with respect to necessity. We have also spoken of *probability*, which allows us to say «that life is essentially a project»³⁷; but if we understand the *ars inveniendi* as a method, we discover its ability to identify the *ideal structure* of reality, coinciding with the divine essence, that it is the result of scientific inquiry and not of a theology. The focus on the Leibnizian problem in Margiotta ends up having an eminently pedagogical end which is expressed in these terms: «But the contemporary court of the pedagogue must take due account of all this: a genealogical account, meanwhile, and critical together, to understand where and why it originates that *drift of meaning* conferred on the term *pedagogy* (italics is ours), which in truth never entirely coincides with the current use of the word»³⁸. First of all, the *tribunal* is striking, recalling the Kantian *critique* of reason as a tool for investigation, both critical and genealogical, to address the *drift* that accompanies the term in the present. Secondly, it is like being in a metaphorical jungle full of pitfalls: good or bad teaching methods, evalu-

³⁴ Leibniz, *Confessio Philosophi*, cit., p. XLI.

³⁵ *Ibid.*, p. XLIV.

³⁶ *Ibid.*, p. XLII.

³⁷ *Ibid.*

³⁸ *Ibid.*, p. XLV.

ation problems, relations with institutions and families, relations with other knowledge, particularly «human sciences». Yet our interpreter, almost with impatience, suggests that we look at the birth and evolution of modern pedagogy «as the other side of the problem of Knowledge»³⁹.

The *basic pedagogy*, which has been mentioned above, is to be considered as a solid *foundation on which to build the training process*, «Here is the radical questioning of the object of pedagogy, as it is born and is configured in that time period as a very fundamental pedagogy of intellect and invention»⁴⁰. The reference to specific Leibnizian terms is relevant, in our opinion, since the German philosopher not only focuses on *intelligere* as a *fundamental* element but also on *inventing*, which involves the use of the imaginary as a resource that goes beyond reason⁴¹. Margiotta clarifies the need for pedagogy to assume an anti-nominalistic and anti-mechanistic character, a real form of liberation from conditionalities that sometimes remain in hidden form, to organize itself around «cognitive demands» The progressive learning related.

One point remains central, which our education epistemologist strongly outlines: «It is therefore the type of organization of knowledge and its paradigms, that is to say the program of intra-theoretical and *trans-disciplinary* communication which decides profoundly on the educational style, both in those who learn and in those who teach»⁴². Half a century ago, Margiotta used the two terms of communication, intra-theoretical and trans-disciplinary, as determining factors in the fundamental pedagogy of the present, adding that this should concern both those who learn and those who teach. The evidence is that theories need to dialogue with each other in order to consolidate a critical approach to knowledge and, at the same time, the central issue of the transition-exchange between model disciplines is stressed, methods, approaches, which sanctify the convergences and the divergences, in the perspective of a metacognitive dynamic that requires the active participation of the subjects involved.

³⁹ *Ibid.*

⁴⁰ *Ibid.*, p. XLVI.

⁴¹ Cfr. G. Durand, *Le strutture antropologiche dell'immaginario: introduzione all'archetipologia generale*, Bari, Dedalo, 1972.

⁴² Leibniz, *Confessio Philosophi*, cit., p. XLVII.

Lo Hobbit a fumetti. Considerazioni su un «fantasy illustrato» tra il Novecento e gli anni Duemila

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The Hobbit: A Graphic Novel. Thoughts about an «illustrated fantasy» between the Twentieth Century and the 2000s

ABSTRACT: Between the mid-twentieth century and the early 2000s, many artists have depicted Middle-earth through paintings and drawings. J.R.R. Tolkien himself has accompanied and embellished his books with artistic works that could describe the places and characters that arose from his imagination. Even in the field of comic art, high quality books have been produced and published and, in some cases, real innovative reinterpretations of Tolkien's works. This essay will focus only on *The Hobbit: A Graphic Novel* (in Italian: *Lo Hobbit a fumetti*) and, in particular, on the way in which one of the most important characters of Middle-earth is represented in it, namely: Gollum.

EET/TEE KEYWORDS: Fantasy; Graphic Novel; J.R.R. Tolkien; *The Hobbit*; Gollum; XX-XXI Centuries.

Introduzione

Mediante il Decreto Ministeriale n. 639 del 02 maggio 2024, il Ministero dell'Università e della Ricerca (MUR) italiano ha inteso determinare i gruppi scientifico-disciplinari e le relative declaratorie, nonché razionalizzare e aggiornare i settori scientifico-disciplinari e ricondurre questi ultimi ai gruppi scientifico-disciplinari.

Per ciò che concerne l'ambito storico-pedagogico, all'interno del più ampio alveo del gruppo scientifico-disciplinare denominato Pedagogia e Storia della pedagogia e dell'educazione (11/PAED-01), nella descrizione del settore scien-

tifico-disciplinare rubricato sotto il nome di Storia della pedagogia e dell'educazione (PAED-01/B) – precedentemente classificato come M-PED/02 (Storia della pedagogia) – nel Decreto è scritto che tale settore scientifico-disciplinare: «Si interessa all'attività scientifica e didattica relativa [...] alla letteratura e ai media per l'infanzia e per la gioventù (nelle loro dimensioni storiche, letterarie, artistiche e pedagogiche)»¹.

Ciò significa che anche la letteratura fantastica – che appartiene al più ampio contesto della narrativa giovanile – risulta di particolare interesse per questo settore accademico, in quanto essa può rappresentare un veicolo privilegiato per la riflessione sui valori etici e pedagogici, sulla storia dell'editoria contemporanea e sulle possibili prospettive educative, culturali e comunicative sviluppate attraverso i diversi media e le nuove tecnologie².

Uno dei 'luoghi narrativi' in cui quest'arte letteraria si esprime è, senza dubbio, il fumetto e il *grafic novel*. Infatti, sotto quest'aspetto, rilevanti sono le parole di Emilio Verrà che così ha affermato in un volume collettaneo dedicato alla letteratura per l'infanzia:

Vero è che mai come ora la presenza del fumetto e la sua dignità culturale hanno penetrato l'immaginario comune. [...] Questa acquisizione di consapevolezza, insieme a un ampliamento del bacino dei lettori, è l'imperativo pedagogico al quale tutti siamo chiamati a rispondere, tanto più se abbiamo una funzione sociale che ha a che fare con la trasmissione culturale. [...]. Riconoscere e far conoscere i "fumetti fatti bene", per la capacità di utilizzare il linguaggio a disposizione e per lo spettro di contenuti, di emozioni e di riflessioni che con esso possono veicolare: questo deve essere l'obiettivo futuro³.

Tale obiettivo di studio e diffusione culturale è anche lo scopo del presente saggio che mira a mostrare cosa accade quando la fantasia e l'immaginazione di un maestro come J.R.R. Tolkien incontrano i contorni del disegno di un'artista, creando l'incanto di una storia che, attraverso le pagine di un libro illustrato, è capace di squadernare orizzonti nuovi anche, e soprattutto, nel bel mezzo del Novecento e nei primi scampoli degli anni Duemila.

¹ Ministero dell'Università e della Ricerca, Decreto Ministeriale n. 639, Allegato A, 2 maggio 2024, p. 430.

² Per un approfondimento su tale aspetto si veda: W. Grandi, *Il fantastico e la letteratura per l'infanzia: tracce e presenze negli ultimi tre decenni*, in S. Barsotti, L. Cantatore (edd.), *Letteratura per l'infanzia. Forme, temi e simboli del contemporaneo*, Roma, Carocci editore, 2019, pp. 343-358.

³ E. Verrà, *Le nuove frontiere del fumetto: dai classici al graphic novel*, in Barsotti, Cantatore (edd.), *Letteratura per l'infanzia*, cit., p. 207.

1. *Un breve excursus storico sulle illustrazioni tolkieniane*

Nel 1951, John Ronald Reuel Tolkien, ormai affermato creatore di mondi fantastici, ha vergato una lettera destinata a Milton Waldman della casa editrice Collins nella quale – oltre a riassumere i tratti salienti dei personaggi e delle vicende del suo *Silmarillion* e de *Il Signore degli Anelli* mostrandone l'interdipendenza e l'indivisibilità – ha indicato la possibilità che la creazione letteraria (o meglio la «subcreazione» così come egli la chiamava⁴) possa essere arricchita, prolungata e ampliata da altre forme di bellezza artistica. Infatti, in tale missiva così lo scrittore inglese ha affermato circa le sue opere: «I cicli sarebbero stati legati a un tutto maestoso, eppure avrebbero lasciato libertà di azione ad altre menti e mani, che praticassero il disegno, la musica e il teatro»⁵.

Nel corso degli anni, queste parole hanno generato un flusso creativo che ha percorso i diversi *media* portando alla produzione di opere artistiche, di scritture e riscritture, connesse alla Terra di Mezzo e al suo autore⁶. Infatti, Tolkien stesso è stato una di quelle ‘mani’ che hanno disegnato e arricchito la parola con l'immagine: nel Professore di Oxford l'arte si è dispiegata a tutto tondo creando mondi letterari, visivi e immaginari mai visti prima⁷.

A voler delineare un ‘percorso storico’ della vicenda artistica riguardante le illustrazioni e i disegni della Terra di Mezzo, sulla scorta di quanto scritto da Davide Martini, si potrebbero rintracciare quattro periodi storici essenziali⁸.

Il primo periodo percorre gli anni '30 e '40 del secolo scorso: è il «periodo originario», ossia quello in cui Tolkien stesso ha illustrato i suoi testi⁹ e, in

⁴ Infatti, nel saggio *Sulle fiabe*, così Tolkien ha scritto: «Ma in una simile ‘fantasia’, come viene chiamata, si crea una nuova forma; ha inizio il Mondo Fatato; l'Uomo diviene un sub-creatore. [...] La Fantasia resta un diritto umano: noi creiamo a nostra misura e secondo la nostra modalità derivata, perché siamo stati creati: e non soltanto creati, ma creati a immagine e somiglianza di un Creatore» J.R.R. Tolkien, *On Fairy-stories*, in Id., *The Monsters and the Critics and other essays*, London, HarperCollins Publishers, 2006; Italian Transl. *Sulle fiabe*, in J.R.R. Tolkien, *Il medioevo e il fantastico*, Milano-Firenze, Bompiani-Giunti Editore, 2018, pp. 185 e 214.

⁵ Id., *The Letters of J.R.R. Tolkien*, London, HarperCollins Publishers; Italian transl. *Lettere 1914/1973*, Milano-Firenze, Bompiani-Giunti Editore, 2018, p. 230.

⁶ Sul punto si veda: C. Susca, «Chissà se ci metteranno mai nelle canzoni e nei racconti...». Tolkien e il viaggio nel tempo delle storie, in O. Cilli, G. Pezzini, I. Sassanelli (edd.), *Sentieri Tolkieniani. Viaggi, strade e incontri nella Terra di Mezzo*, Bari, Dots, 2024, pp. 210-231.

⁷ Per un approfondimento sull'arte visiva e sulle illustrazioni scaturite dalla mente del Professore oxoniense si rimanda a: W.G. Hammond, C. Scull, J.R.R. Tolkien: *Artist and Illustrator*, London, HarperCollins Publishers, 2004; Italian transl. J.R.R. Tolkien. *Artista e illustratore*, Milano-Firenze, Bompiani-Giunti Editore, 2024; R. Tosi, *L'arte di Tolkien. Colori, visioni, suggestioni dal creatore della Terra di Mezzo*, Milano, Alcatraz, 2023.

⁸ Cfr. D. Martini, *Sull'arte della Terra di Mezzo di J.R.R. Tolkien*, in Tolkien. *Uomo, Professore, Autore*, Milano, Skira, 2023, pp. 173-179.

⁹ Cfr. *Ibid.*, pp. 173-174.

particolar modo, *Lo Hobbit*¹⁰. Il secondo periodo – che prende gli anni '50 e '60 del Novecento – è quello dei primi illustratori de *Lo Hobbit* e del primo artista inglese, diverso da Tolkien, che ha provato a disegnare la Terra di Mezzo: ossia Ferguson Dewar¹¹. Il terzo periodo è quello “moderno” che va dagli anni '70 alla fine degli anni '90 del secolo scorso e che ha visto autori e autrici e illustratori e illustratrici del calibro di Tim Kirk, Roger Garland, Chris Achilleos, Ted Nasmith, Maria Distefano, Luca Michelucci, Ivan Cavini, e tanti altri, cimentarsi con la riproposizione in chiave artistica e per immagini della Terra di Mezzo e dei suoi protagonisti¹². L'ultimo, e quarto periodo, è quello iniziato alla fine degli anni '90 del Novecento e che è giunto fino al primo ventennio del nuovo Millennio. Sebbene ci siano artisti che abbiano mostrato – e mostrano ancor oggi – la loro originalità come Jay Johnstone, questi anni sono stati fortemente influenzati dalle trasposizioni cinematografiche di Peter Jackson e dai disegni e dalle opere realizzate da John Howe e Alan Lee che, col regista neozelandese, hanno collaborato per la realizzazione grafica e artistica delle due trilogie apparse sul grande schermo agli inizi degli anni Duemila¹³.

2. *Lo Hobbit a fumetti: alcuni caratteri generali*

Proprio all'interno di questo flusso artistico si innesta anche la creatività di alcuni tra i maggiori fumettisti di caratura nazionale e internazionale¹⁴. Infatti, nel terzo periodo della storia editoriale e artistica concernente le opere di Tolkien, ha visto la sua comparsa *Lo Hobbit a fumetti* edito originariamente in inglese col titolo *The Hobbit: a Graphic Novel* tra il 1989 e il 1990 in tre volumi per la casa editrice Eclipse Books con le illustrazioni di David Wenzel e l'adattamento di Charles Dixos e Sean Denning e, successivamente, in Italia prima nel 2000 e poi nel 2021 per le case editrici Bompiani e Giunti Editore¹⁵. Circa questo testo, Davide Martini così ha affermato:

Un altro grande successo editoriale di questo decennio è la trasposizione a fumetti de *Lo Hobbit* di David T. Wenzel, che prosegue un discorso personale cominciato nel 1977,

¹⁰ Sul punto si veda: W.G. Hammond, C. Scull, *The Art of The Hobbit by J.R.R. Tolkien*, London, Harper Collins, 2011; Italian transl. *L'arte dello Hobbit di J.R.R. Tolkien*, Milano-Firenze, Bompiani-Giunti Editore, 2022.

¹¹ Cfr. Martini, *Sull'arte della Terra di Mezzo di J.R.R. Tolkien*, cit., p. 175.

¹² Cfr. *Ibid.*, pp. 175-178.

¹³ Cfr. *Ibid.*, pp. 178-179.

¹⁴ Per un approfondimento preciso ed esaustivo circa i fumetti che trattano in maniera seria o ironica i racconti della Terra di Mezzo si veda: O. Cilli, *Guida completa al mondo di Tolkien*, Milano, Vallardi, 2022, pp. 171-186.

¹⁵ Nel testo ci rifaremo a: J.R.R. Tolkien, *The Hobbit: a Graphic Novel*, Forestville-California, Eclipse Books, 1989-1990; Italian transl. *Lo Hobbit a fumetti. O la Riconquista del Tesoro*, Milano-Firenze, Bompiani-Giunti Editore, 2021.

e che prende spunto da quella parte dell'illustrazione tolkieniana più "leggera" e mai esaurita, che passa da Michael Hague, illustratore de *Lo Hobbit* nel 1984 e che si riallaccia ai lavori di Pauline Baynes, l'illustratrice prediletta da Tolkien che nel lontano 1949 creò immagini per il suo *Farmer Giles of Ham*, con riferimenti all'immagine fiabesca di Edmund Dulac ed Arthur Rackham¹⁶.

In Italia la versione de *Lo Hobbit* a fumetti ha come traduzione ufficiale quella di Caterina Ciuffferri¹⁷ la quale è stata la seconda delle traduttrici della storia di Bilbo Baggins e dei Nani, dopo la versione del 1973 de *Lo Hobbit* tradotta da Elena Jeromidis Conte (la quale aveva avuto anche uno scambio epistolare con il Professore¹⁸) per l'editrice Adelphi¹⁹ e prima della recente traduzione del 2024 di Wu Ming 4 (ossia Federico Guglielmi) per la casa editrice Bompiani-Giunti Editore, edizione quest'ultima che contiene anche le illustrazioni prodotte da Tolkien stesso²⁰.

La data di composizione de *Lo Hobbit a fumetti* è significativa in quanto, alla fine degli anni '80 e gli inizi degli anni '90 del secolo scorso, ancora le trasposizioni di Peter Jackson non avevano invaso il mondo tolkieniano²¹, creando di fatto stereotipi e prototipi per le generazioni future di disegnatori e illustratori. Ciò ha permesso a Wenzel di dispiegare in pienezza la sua fantasia e di creare immagini e fumetti originali e non convenzionali.

Infatti, sfogliando le pagine di questo volume, la distanza con i tratti caratteristici dei film jacksoniani risulta evidente sia nelle ambientazioni sia nella caratterizzazione dei personaggi e nelle loro attitudini. Un esempio evidente è quello di Thorin Scudodiquercia, il Re Sotto la Montagna, che se al cinema appare come un aitante e giovane Nano, nel fumetto, invece, è rappresentato come un Nano canuto e con la barba bianca, anziano ma ancora vitale e vigoroso.

Ciò permette di mostrare quanto la fantasia possa svilupparsi e creare, di

¹⁶ Martini, *Sull'arte della Terra di Mezzo di J.R.R. Tolkien*, cit., p. 178.

¹⁷ La traduzione di Caterina Ciuffferri è presente anche in: J.R.R. Tolkien, *The Annotated Hobbit*, annotated by Douglas A. Anderson, London, HarperCollinsPublishers, 2002; Italian transl. *Lo Hobbit annotato*, da Douglas A. Anderson, Milano-Firenze, Bompiani-Giunti Editore, 2017.

¹⁸ Sul punto si veda l'intervista fatta a Elena Jeromidis Conte contenuta in: O. Cilli, *Tolkien e l'Italia*, Rimini, Il Cerchio, 2016, pp. 343-346.

¹⁹ Cfr. J.R.R. Tolkien, *The Hobbit. Or There and Back Again*, London, Harper Collins, 1966; Italian transl. *Lo Hobbit. O la Riconquista del Tesoro*, Adelphi, Milano, 1973.

²⁰ Cfr. J.R.R. Tolkien, *The Hobbit. Or There and Back Again*, illustrated by the Author, London, HarperCollins Publishers, 2023; Italian transl. *Lo Hobbit. Illustrato dall'autore*, Milano-Firenze, Bompiani-Giunti Editore, 2024.

²¹ Per un approfondimento si veda: T. Shippey, *Another Road To Middle Earth: Jackson's Movie Trilogy*, in N.D. Isaacs, R. Zimbardo (edd.), *Undestanding The Lord of the Rings*, Boston, Houghton Mifflin, 2004, pp. 233-254; Italian transl. *La versione cinematografica di Peter Jackson*, in T. Shippey, *J.R.R. Tolkien: la via per la Terra di Mezzo*, Bologna, Marietti 1820-Centro editoriale dehoniano, 2018, pp. 491-514.

fatto, di un unico personaggio, immagini completamente diverse se non alle volte antitetiche.

3. *Gollum: dal testo al fumetto*

All'interno delle vicende de *Lo Hobbit*, tanto a fumetti quanto nei testi di Tolkien e nei film di Jackson, una delle creature più strane è senza dubbio Gollum.

Nato come un personaggio secondario all'interno della prima edizione dell'opera del Professore nel 1937, Gollum ha assunto un ruolo decisivo quando negli anni '50 del secolo scorso l'oxoniense ha dovuto riscrivere il capitolo V de *Lo Hobbit*, riadattandone i personaggi, tra cui Gollum, e la natura dell'anello che egli portava con sé, al fine di creare un ponte tra questo testo e *Il Signore degli Anelli* che, nel frattempo, egli stava scrivendo²².

Per cercare di capire la caratterizzazione che Wenzel ha voluto dare a Gollum nelle sue illustrazioni, è importante rifarsi al testo de *Lo Hobbit*, nel quale si legge:

Qui, nel profondo, presso l'acqua scura, viveva il vecchio Gollum, un essere piccolo e viscido. Non so da dove venisse, né chi o cosa fosse. Era Gollum, scuro come l'oscurità stessa, eccezion fatta per due grandi occhi rotondi e pallidi nel viso scarno. Aveva una barchetta e silenziosamente la spingeva sul lago [...]. Come remi egli usava i suoi larghi piedi [...]. Con i suoi pallidi occhi cercava pesci ciechi che afferrava con le lunghe dita, veloci come il pensiero²³.

Dunque, Gollum viene presentato come un personaggio misterioso, viscido, piccolo e magro, con occhi tondi e pallidi, larghi piedi, dita lunghe e scuro come la stessa oscurità. In aggiunta a questo testo si deve rilevare quanto il Professore ha scritto in alcune note raccolte in *The Nature of Middle-earth* circa le vignette apparse nel 1970 sul poster *Map of Middle-earth*, illustrato da Pauline Baynes, in cui venivano raffigurati anche la Compagnia dell'Anello e Gollum. In queste note, Tolkien così ha parlato di questa strana e misteriosa creatura e di come le vignette lo rappresentavano:

His long hands are therefore more or less right. Not his feet. They are exaggerated. They are describe as *webby* (Hobbit 88), *like a swan's* (I 398), but had prehensile toes (II 219). But he was very thin – in the LR emaciated, not plumb and rubbery; he had for his size a *large head* and a *long thin neck*, very large eyes (protuberant), and thin lank hair. He is

²² Un'acuta e pionieristica sintesi delle differenze tra la prima e la seconda edizione de *Lo Hobbit* si trova in: B. Christensen, *Gollum's Character Transformation in The Hobbit*, in J. Lobdell (ed.), *A Tolkien Compass*, Chicago and La Salle, Open Court, 2003, pp. 7-26.

²³ Tolkien, *Lo Hobbit annotato*, cit., pp. 132-133.

often said to be dark or black. At his first mention (Hob. 83) he was ‘dark as darkness’: that of course means no more than that he could not be seen with ordinary eyes in the black cavern – except for his own large luminous eyes; similarly ‘the dark shape’ at night (I 399, 400). But that does not apply to the ‘black (crawling) shape’ (II 219, 220), where he was in moonlight. Gollum was never *naked*. He had a pouch in which he kept the Ring (Hob. 92). He evidently had black garments (II 219) [...]. His skin was white, no doubt with a pallor increased by dwelling long in the dark, and later by hunger. He remained a human being, not an animal or a mere bogey, even if deformed in mind and body; an object of disgust, but also of pity²⁴.

Ecco, dunque, come Tolkien ha descritto uno dei suoi personaggi più importanti, quello in cui tanto i lettori dei libri quanto quelli dei fumetti o gli spettatori dei film possono riconoscersi, sperimentando un senso di pietà anche nel disgusto²⁵.

Nel delineare i tratti caratteristici di questo personaggio, il Professore si è soffermato sulla sua statura, sulle particolarità della sua testa e dei suoi occhi, dei suoi piedi, del colore della sua pelle e del suo vestiario. Ciò si era reso necessario a causa di alcuni malintesi che sin dagli anni '30 avevano accompagnato la figura di questo personaggio.

In sostanza, Gollum è stato sin da subito uno “strano caso” tanto dal punto di vista letterario e narrativo, quanto da quello illustrativo e fumettistico. Infatti, spesso questa creatura è stata ritratta in una maniera che non collimava con l'immagine mentale e narrativa che il Professore aveva di lui. Ciò risulta evidente in alcune illustrazioni apparse, ad esempio, nell'edizione svedese de *Lo Hobbit* del 1947 in cui Gollum è disegnato come una roccia scura e più grande di circa quattro volte le dimensioni di Bilbo; oppure nell'edizione tedesca del 1957 nella quale egli è di parecchie volte più grande del Signor Baggins; o ancora, nell'edizione portoghese del 1962, Gollum è una figura barbata e inguardabile; e, infine nell'edizione giapponese del 1965, egli è un enorme rettile, grande tre volte la misura di Bilbo²⁶.

Al fine di porre rimedio a questa disparità di illustrazioni circa Gollum, Tolkien ha innanzitutto modificato il testo del suo racconto, il quale originariamente, nell'edizione del 1937, affermava semplicemente: «Qui, nel profondo, presso l'acqua scura, viveva il vecchio Gollum»; mentre nell'edizione del

²⁴ Id., *The Nature of Middle-earth. Late Writings in Lands, Inhabitants and Metaphysics of Middle-earth*, London, HarperCollins Publishers, 2021, pp. 195-196.

²⁵ Infatti, come ha affermato Andrea Monda: «Mi affascina il trio Frodo, Sam e Gollum. In particolare Gollum è il personaggio più drammatico e tragico del romanzo, per certi versi struggente. È una mini compagnia all'interno della quale c'è anche il traditore, ma è probabilmente la parte più commovente del romanzo e più vicina a noi. A volte infatti siamo Frodo o Sam, ma di tanto in tanto bisogna riconoscere di essere come Gollum» in R. Benotti, *Tolkien e Il Signore degli Anelli*. Monda (*L'Osservatore Romano*): “Un'Europa chiusa come la Contea della Terra di Mezzo è destinata a Morire”, Last updated: 01.09.2019, <<https://www.glisicritti.it/blog/entry/5020>> (ultimo accesso: 05.03.2025).

²⁶ Tali informazioni si trovano in: Tolkien, *Lo Hobbit annotato*, cit., pp. 132-133, nota 5.

1966 a questa frase, l'autore ha aggiunto che Gollum era: «un essere piccolo e viscido»²⁷.

A tutto questo si devono aggiungere alcune affermazioni che lo stesso autore ha pronunciato a commento delle illustrazioni riguardanti Gollum, comparse nelle varie edizioni internazionali de *Lo Hobbit*. Infatti, già prima dei rilievi fatti alle vignette apparse nel 1970 sul poster *Map of Middle-earth*, in una lettera del 12 dicembre 1963 alla casa editrice Allen & Unwin, Tolkien scriveva:

Gollum non deve essere disegnato come di fatto lo ritraggono tutti gli illustratori, in disprezzo del testo. [Egli] dovrebbe essere una piccola viscida creatura non più grande di Bilbo; magro con una grande testa, non proporzionata al corpo, occhi grandi e sporgenti, un collo lungo e sottile, capelli fini e radi. La sua pelle è bianca, e per contrasto indossa vesti nere. (Non è mai nudo). Le sue mani sono lunghe e i piedi membranosi con le dita prensili²⁸.

Ancora una volta, Tolkien ha dato in queste righe l'esatta descrizione di Gollum al fine di illustrarlo, nei libri e nei fumetti (e successivamente nei film), in maniera quanto più aderente possibile alla sua immaginazione e alla lettera del testo scritto.

Se si osserva il Gollum dei film di Peter Jackson, la descrizione fisica contenuta nelle note e nelle lettere di Tolkien, sembra essere stata rispettata dal regista neozelandese e dagli illustratori di cui egli si è servito come, ad esempio, Alan Lee²⁹.

Invece, se si considerano le vignette e i disegni che ritraggono Gollum ne *Lo Hobbit a fumetti*, ci si rende conto di alcune caratteristiche peculiari di tali immagini³⁰. Infatti, in esse, Gollum è magro; deforme, ma pur sempre appartenente alla natura umana; ha gli occhi sporgenti, i piedi prensili, i capelli radi e il collo allungato; la sua pelle al buio appare di un blu scuro intenso mentre alla luce della spada di Bilbo essa risulta chiarissima.

In queste illustrazioni fumettistiche, però, esiste una caratteristica di Gollum che differisce in maniera sostanziale tanto dalle descrizioni proposte da Tolkien nelle sue lettere e note quanto dalle altre immagini contenute nelle varie edizioni de *Lo Hobbit* e nelle trasposizioni cinematografiche jacksoniane degli anni Duemila. Infatti, ne *Lo Hobbit a fumetti*, Gollum indossa dei pantaloni ed essi non sono neri – colore indicato dallo stesso Professore per le vesti indossate da questa creatura – ma, bensì, rossi. Tale scelta appare, da un lato, straniante e, dall'altra, potrebbe essere la cifra del disegno di David Wenzel il

²⁷ Cfr. *Ibid.*, p. 132, nota 5.

²⁸ *Ibid.*, p. 149, nota 30.

²⁹ Un'illustrazione di Gollum in bianco e nero fatta da Alan Lee nel 1997 si trova in: J.R.R. Tolkien, *The Hobbit. Or There and Back Again*, illustrated by Alan Lee, London, HarperCollins Publishers, 2020; Italian transl. *Lo Hobbit. Un viaggio inaspettato*, illustrazioni di Alan Lee, Milano-Firenze, Bompiani-Giunti, 2023, p. 77.

³⁰ Cfr. Tolkien, *Lo Hobbit a fumetti*, cit., pp. 42-54.

quale, volendo caratterizzare in maniera personale e insolita questo personaggio, ha voluto fornire alla scena un tocco di colore che risaltasse nell'oscurità delle caverne delle Montagne Nebbiose.

Conclusione

L'analisi dei fumetti riguardanti *Lo Hobbit* ci ha permesso di scandagliare ancor meglio la fantasia di uno dei più importanti autori del Novecento: J.R.R. Tolkien.

Il Professore di Oxford, attraverso le sue lettere e le sue osservazioni critiche, ha condotto i lettori, gli editori e gli illustratori a confrontarsi con la sua immaginazione e con la pagina scritta dei suoi racconti. Nella Terra di Mezzo versi e disegni interagiscono come un unico progetto che conduce alla subcreazione di mondi secondari e di tempi immaginari.

La meraviglia e l'incanto scaturiti dalla penna e della matita permettono, così, di dar vita a una creatura insolita come Gollum che mette a dura prova la sensibilità artistica di coloro che lo vogliono rappresentare attraverso l'artisticità delle illustrazioni. Gollum è al tempo stesso una «persona» e un «mistero» in quanto è uno «strano caso» – unico nel suo genere – in cui il «disgusto» si mescola alla «pietà», in cui la «miseria» si affianca alla «misericordia», in cui il buio viene illuminato da una luce sorprendente e meravigliosa capace di disperdere anche le tenebre più oscure.

Kashubian Dramaturgy for Young Audiences. Review of Authors and Conventions

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ABSTRACT: The article concerns the development of Kashubian-language drama aimed at children and youth audiences. The considerations discuss several playwrights who have written plays from the 1980s to the present. The article focuses on works written in the last twenty years of the 21st century (S. Fikus, A. Pepliński, E. Pryczkowska, T. Wejer, D. Formela, F. Baska-Borzyszkowska). Their common feature is strong didacticism and a constant moralizing, which makes them works of average, not outstanding, artistic value. The reason for this situation is that the Kashubian language has only had the status of an ethnic minority language since 2005 and has only since then been able to develop freely in the public space.

EET/TEE KEYWORDS: Kashubian drama for children and youth; Cultural identity; Images of folk culture; Native culture in drama; XXI Century.

Introduction

Research into Kashubian culture lacks major academic analyses of drama and theatre for young audiences. Although there are a handful of studies, which I will refer to in the following sections, they do not form a systematic description or result from consistent research but are rather reviews of anthologies of stage play texts or reactions to selected acts of Kashubian theatre life. Most information on Kashubian-language drama for young audiences is contained in a monograph by the writer of these words entitled *Kashubian Theatre. Phenomenon, Forms, Environment* from 2021¹. As this work is a

¹ D. Kalinowski, *Teatr kaszubski. Fenomen. Formy. Środowisko*, Gdańsk, Instytut Kaszubski, Zrzeszenie Kaszubsko-Pomorskie, 2021.

comprehensive and synthetic account of the issue, it does not contain a separate chapter reviewing the authors, stylistics or subject matter of published Kashubian dramas aimed at children and youth audiences. All the more reason, therefore, to fulfil such a task in the overview and problematisation article presented today.

From the point of view of cultural anthropology, we can say that Kashubian theatre originates from four sources². The first source is ancient rites and rituals, some of which have survived to the present day and have been reflected in performances, stagings, and theatricalisations connected with the rituals of St. John's Day, harvest festivals, or potato picking. Relics of pre-Christian beliefs connected with the cycles of nature can be found in theatrical activities of this type. Performances originating from the first source of Kashubian theatre include gestures, songs, dances, and dramatizations, which are associated with primitive and magical culture.

The second source of Kashubian theatre is the Christmas, New Year, and Easter rituals, in which the religious content of Christianity is combined with a folk perception of reality. These include activities with theatricalised fancy dress parades (with biblical and symbolic figures and animal figures), which were and still are popular in rural communities³. The element of celebrating important moments of the liturgical year while appreciating the agrarian year is included in performances of this type. The theatrical practice of the performance on stage or outdoors includes musical elements, such as noisy instruments like bells or knockers, which 'chase away' the old year, and magical-ritual forms of conjuring the new year to bring all the good things of nature to the house in question.

The third source of Kashubian theatrical activities is the tradition of amateur-folk theatre, which developed in intellectual circles of small Kashubian towns and among animators of village cultural life. This theatre trend has been popular since the first half of the 20th century and continues in Kashubia to this day⁴. This phenomenon led to the creation of ludic, educational, and patriotic plays. They showed the social and moral realities of Kashubia and the model of private and community life. Presentations of this trend were created in the aesthetics of realism, sometimes having factors of naturalism or satire.

The fourth source of Kashubian theatre is the tradition of ethnic theatre, i.e., theatre that stems from the desire to speak about Kashubian identity not through ritual or custom but through ideological discussion, setting identity

² K. Derc, *Teatry ludowe na Kaszubach*, «Teatr Ludowy», n. 6, 1929, pp. 109-111; K. Orska, *Ludowy teatr kaszubski – geneza i droga rozwoju*, «Pomerania», n. 5-6, 1970, pp. 9-26.

³ I.H. Świętosławska, *Chceta wa lędzë gwioźdzkã widzec? Opowieść o kaszubskich kołędnikach godowych*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 2016.

⁴ Z. Raszewski, *Z tradycji teatralnych Pomorza, Wielkopolski i Śląska*, Wrocław, Zakład im. Ossolińskich, 1955, pp. 65-104; R. Górski, *Dramat ludowy XIX wieku*, Warszawa, Państwowy Instytut Wydawniczy, 1969.

goals, and becoming aware of one's own ethnic distinctiveness⁵. Theatre of this kind develops the imagination and the sphere of Kashubian communal values. The plays then depict historical events or refer to mythical people and, at the same time, express the playwrights' attitude towards the socio-political or identification issues that are current to them.

1. *Attempts to reach young audiences*

In Kashubian drama, the first signs of authors' attention to a young audience can be seen only in the times of the Young Kashubians, i.e., the third generation of Kashubian writers (active from the 1890s to the 1930s). Aleksander Majkowski, Jan Karnowski, and Leon Heyke, generally writing for adults, created a child literary hero in their works and noticed the fact that a story for an adult audience can also have a strong identity effect on very young people. This is the origin of the child protagonist of the drama *Òtròk Swãtewida*⁶ [Grandson of Świętowit] by Jan Karnowski (1886-1939), who in the initial scenes of the play appears to be a teenage, emotionally and intellectually unstructured village boy. The development of the drama's intrigue shows him in ever-changing acts of cognition, through which he transforms from an ordinary shepherd into a socially responsible young man⁷. Karnowski has constructed a stage fairy tale in which one can see a simplified reality with the figures of a beautiful girl, a worker revolution, and a fantastic griffin – the protector of Pomerania. All this was done to emphasise the character's personality development all the more clearly. Formally speaking, the Kashubian playwright created a composition consisting of short scenes with dialogues and sequences of vivid images, which facilitated the perception of the ideological issues of the piece. His play, although it corresponds to the nineteenth-century understanding of art for a young audience, does not have an explicit address to children reading in Kashubian.

This type of situation did not change for several decades until the first Kashubian authors who consciously began to create plays for children and young people. These were Stefan Fikus (1920-2010) and Aleksy Pepliński (1921-2012), who wrote their works in this style from the late 1970s onwards.

Stefan Fikus was the author of 20 plays on a variety of subjects, aimed

⁵ D. Kalinowski, *Dramaturgia Jana Romskiego. Tematy, idee, techniki*, in J. Rompski, *Dramaty kaszubskie*, ed. by J. Treder, Wejherowo, Gdańsk, MPiMK-P, Instytut Kaszubski, 2009, pp. 5-44.

⁶ J. Karnowski, *Òtròk Swãtewida*, in J. Karnowski, *Dramaty*, ed. by M. Cybulski, Gdańsk, Instytut Kaszubski, 2011, pp. 371-394.

⁷ D. Kalinowski, *Obraz – idea – tożsamość. O dramaturgii Jana Karnowskiego*, in Karnowski, *Dramaty*, cit., pp. 71-139.

mainly at an adult audience⁸. However, among them, one can find several forms intended to reach an audience of teenagers with ideas of social, moral, and religious life. The author of the plays believed that artistic creation serves a didactic purpose and conveys positively evaluated images of past times, which should be a point of reference for the present. Fikus opted for short dramatic forms and outlined a simple stage intrigue, bringing about a swift conclusion and resolution of the conflict. This practice of the creator did not allow him to create psychologically rich characters. Moreover, the characters in the plays appeared schematic, expressing in themselves the values that the playwright propagated or, conversely, the vices that he condemned. Fikus' stage proposals were thus marked not only by didacticism but also by moralism, which was intended to serve an ordinary, at only a basic level educated audience. His plays, such as *A śmierć nie przęchôdô* [Death Does Not Come]⁹, *Strach* [Fear]¹⁰ and *Gwiôzdzka z Lężëna* [Christmas Greetings from Luzino]¹¹ may be mentioned here.

For the context of plays for young audiences, other stage proposals by Fikus that are only available in typescript form are also important. So far they have not been published in print, although they have been performed in fragments on the amateur school and parish stage. Firstly, I have in mind the play entitled *Rojeniô dzôtków na IV Pielgrzimkę Ojca sw. do Polsczi w 1991 r.* [Children's dreams for the IV pilgrimage of the Holy Father to Poland in 1991]¹². The events of this one-act play take place among young people on a school tourist trip. The characters in the piece complain about the disappearance of authentic family life. In their view, contemporary culture is driving people away from each other and making them strangers. The teacher listens to their complaints and, in her reaction, presents the young people with even greater problems in the world: wars, poverty, or the ecological situation. The embittered young people, however, do not accept consolation from the teacher and dream of a situation in which they could tell all their worries to the Pope, who is just arriving in Poland, and receive life advice. In the following scenes of the play, the young people's dreams come true, and Pope John Paul II and Polish President Lech Wałęsa listen to the young people's comments. As a result of the meeting, the Pope and the President give advice on how the young generation of Poles

⁸ D. Kalinowski, *Moralistyka w przeróżnych odcieniach. Dramaturgia Stefana Fikusa*, «Nasze Pomorze», n. 16, 2014, pp. 169-196.

⁹ S. Fikus, *A śmierć nie przęchôdô*, in J. Lipuski, B. Pisarek (edd.), *Domôcô bina. Dziewiãc dramów do jigrë. Wëbiór z nônowszi kaszëbsczi lëteraturë*, Wejrowò, Gduńsk, MPiMK-P, Zrzeszenie Kaszubsko-Pomorskie, 2006, pp. 88-138.

¹⁰ Id., *Strach. Teatralnô sztëka w dwuch aktach*, in B. Ugowska (ed.), *Antologiô kaszëbsczi dramë. Spòd strzechë na binã*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 2011, pp. 357-485.

¹¹ Id., *Gwiôzdzka z Lężëna. Sztëka teatralnô w krótczim wëkònanim*, in Ugowska (ed.), *Antologiô kaszëbsczi dramë*, cit., pp. 488-518.

¹² Id., *Rojeniô dzôtków na IV Pielgrzimkę Ojca sw. do Polsczi w 1991 r.*, unpublished.

should act and what values should guide their existential choices. Fikus' play leaves no doubt that Christian virtues and civic responsibility are inalienable elements of contemporary Kashubian life.

Another of Stefan Fikus' plays is a proposal that is a combination of ritual and religious theatre. It is *Gwiôzdka Pokoju ji Nôdzëji* [Christmas Greetings of Peace and Hope]¹³, a stage form using the genre of the nativity play, i.e., an artistic representation of the birth of Jesus Christ, the visit of the Three Wise Men, and the shepherds' bow to the Child. To such a set of characters, Fikus includes numerous scenes with representatives of Kashubian folk culture, which brings the play out of its sacred meanings and shifts it towards moral and patriotic contexts. In addition, Fikus adds the figure of Pope John Paul II to the set of characters against the background of children from all parts of the world. Here, the Pope becomes the most important figure in the play, and it is from his lips that praise is heaped on people preserving Christian tradition and advice on a pious life on earth¹⁴.

In the above-mentioned plays by the Kashubian author, it is clear that the artistic factor has been dominated by the poetics of folk and didactic theatre, in which the most important elements are instructive and addressed to the adolescent audience¹⁵. Fikus assumed that the world of theatre should comment on the social and moral reality existing next door and give young audiences a prescription for a decent life. Hence the strong persuasive factor in his plays.

The second author who consciously began writing for children's theatre was Aleksy Peplinski, author of more than 20 plays. These works were written from the 1970s onwards but were not published until decades later in separate editions: *Bëtowsczé strôszczy* (2006)¹⁶ and *Antologió lëteracczich dokôzów* (2009)¹⁷. These are short theatrical forms that present Kashubian rituals in a schematic and didactic way while bringing with them the most important components of ethnic identification¹⁸. They show the present as a space to be consciously shaped, constantly referring to the past and its former pattern of social order and security. This ideological premise of the plays makes them subordinate to a moralistic function. Peplinski's dramas prepare the young viewer to recognise the basic signs of Kashubian folk culture.

¹³ Id., *Gwiôzdka Pokoju ji Nôdzëji*, unpublished.

¹⁴ R. Wierzbowski, *Z zagadnień polskiej szopki kolędowej i satyrycznej*, «Zeszyty Naukowe Uniwersytetu Łódzkiego», S. I, vol. 41, 1965, pp. 47-65; Id., *O szopce. Studia i szkice*, ed. by M. Waszkiel, Łódź, Polski Ośrodek Lalkarski POLUNIMA, 1990.

¹⁵ Such were the values that folk and non-professional theatre also served in other parts of Europe, see: R. Rolland, *Teatr ludowy*, P. Olkusz (transl. and ed.), Gdańsk, Słowo/Obraz Terytoria, 2008 [first publishing: 1903].

¹⁶ A. Pepliński, *Bëtowsczé strôszczy. Òbrazë na binã*, Gdynia, Region, 2006.

¹⁷ *Antologió lëteracczich dokôzów*. Antón i Aleks Peplińsce, ed. by J. Tréder, Sierakowice, Urząd Gminy, 2009.

¹⁸ D. Kalinowski, *W u(s)cisku teatru obrzędowego i okolicznościowego. O dramaturgii Aleksego Peplińskiego*, «Acta Cassubiana», vol. XIV, 2012, pp. 66-83.

The most interesting and, at the same time, the earliest of Pepliński's ritual plays is *Kaszëbsczé jaselka* [Kashubian Christmas Plays], which can be seen as a prelude to his later dramas¹⁹. In the first act, we can see a scene in a Kashubian forest, where messengers of hell conspire to trick people who are travelling to Bytów – the Kashubian Bethlehem – towards the coming Jesus. Purtk, Smętek and Bies devise the best ways to deceive the approaching shepherds and prepare for their foul tricks. The second act features the stable of Bethlehem, where Saint Mary, along with Saint Joseph and the Child, is visited by archangels and hosts of angels. Later, they receive tributes from Kashubian shepherds. In the third act, the action of the drama takes place in the palace of Herod, who, although he is a Jewish king, is visited by three Kashubian princesses travelling to Bethlehem/Bytown. The fourth act is written in an exalted style and shows the Kashubian princes making gifts to the Child. Later, three classical Kashubian writers appear and offer their artistic works. Then come three Kashubian knights-at-arms, giving the Holy Family the most precious objects they have. At the end of this gallery of characters in the drama are Stolem, Borowa Ciotka, and Królewianka, symbolic figures from Kashubian legends and tales.

The drama recalled here is highly imbued with Kashubian patriotism. It mythicises the geographical space of Kashubia and portrays it as the Holy Land. By saturating the space of the drama with Kashubian realities, the viewer sees not so much ancient Palestine as contemporary Kashubia. *Kaszëbsczé Jaselka* thus becomes a religious and ritual play, with many characters, songs, and folk behaviour, which by its spectacularity is meant to encourage young viewers to practice Kashubian culture.

Aleksy Pepliński's later dramas are either extended versions of the parts signalled in *Kaszëbsczé Jaselka* [Kashubian Christmas Plays], or more folkloristic depictions of Kashubian ritual culture. In the drama *Wilijô* [Christmas Eve], the author shows the evening before Christmas, during which old customs are played out²⁰. Thus, we have here the preparation of Christmas Eve supper, decorating the Christmas tree, feeding animals with special wafers, singing carols, the appearance of the Father Christmas with presents and the entry of a group of carol singers with a Gendarme, a Gwiżdż [the character that leads the procession], Goat, Horse, Dubelt Peasant, Stork and Chimney Sweep. Another stage picture entitled *Gwiôzdczé* depicts the time of the Kashubian ritual calendar stretching between Christmas and New Year²¹. This time, however, at

¹⁹ A. Pepliński, *Kaszëbsczé jaselka. Widowisko gwiozdkowé w sztyrech aktach*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 1986.

²⁰ A. Pepliński, *Wilijô. Gwiôzdkowé widzawiszczé w jednym akce*, in Id., *Bëtowszczé strôszczy: ôbrazë na binã*, Gdynia, Region, 2006, pp. 6-32.

²¹ A. Pepliński, *Gwiôzdczé. Gwiôzdkowé widowiskò w sztyrech aktach*, in Id., *Bëtowszczé strôszczy*, cit., pp. 34-46.

the centre of the drama is the very moment of the appearance of the figures of the Christmas procession, additionally with the Three Wise Men and the Star. Another aspect of the rituals we deal with is in the stage picture *Sylwestrowi wieczór* [New Year's Eve], set in a typical rural Kashubian house²². As in each of Peplinski's ritualistic plays, here too there is a juxtaposition of the old and the new. Stark, Tatk, and Mëmka tell the children what events once accompanied the arrival of the new year. They illustrate their memories with scenes of customary fortune-telling (throwing clogs, setting fire to skeins of wool, a trial with a gander). The fortune-telling is not taken completely seriously by the household but is rather a source of merriment and jokes, although it is not rejected. In another stage miniature entitled *Kòlāda* [Christmas Call], Aleksy Peplinski depicts the family's preparations for the annual visit of the priest²³. He appears in the play to consecrate the house and its residents. After the prayers typical in such circumstances, one of the host's daughters – Zosza – recites an occasional poem. After the priest's visit, the inhabitants of the cottage try to take the place where the clergyman was sitting, believing that this will bring them luck. The mother settles the dispute by putting one of her sons in the chair. Neighbours also turn up at the house, wishing them good luck. The song mentioned here is a vivid example of a work of mediocre artistic merit, serving mainly the function of depicting details of Kashubian ritual life.

All of the characterised stage paintings by Aleksy Peplinski clearly confirm the advantages and disadvantages of Kashubian ritual and school theatre created in the socio-political situation after 1945, when Kashubians did not have full rights to manifest their subjectivity²⁴. On the one hand, the telling of stories about the native customs and the shaping of patriotism is valuable here. On the other hand, however, many of the dialogues of Peplinski's plays were provided with rather inept ethnographic content.

2. *The eruption of drama for children*

A change in the approach to Kashubian-language theatre for children can be identified at the turn of the 20th and 21st centuries. There are various reasons for this. The *fristô* is the change of legal relations in Poland and the possi-

²² A. Pepliński, *Sylwestrowi wieczór. Widzawiszczce w jednym akcie*, in Id., *Bëtowiszczce strôszczy*, cit., pp. 76-95.

²³ A. Pepliński, *Kòlāda*, in *Antologiô lëteracczich dokòzów*, cit., pp. 315-335.

²⁴ K. Maksymowicz, *Kaszubska twórczość sceniczna po roku 1945*, in A. Bukowski (ed.), *Literatura gdańska i ziemi gdańskiej w latach 1945-1975*, Gdańsk, Wydawnictwo Morskie, 1979, pp. 310-323; J. Samp, *Nurt regionalny w literaturze dla młodego odbiorcy*, in A. Bukowski (ed.), *Literatura gdańska i ziemi gdańskiej po roku 1945*, Gdańsk, Wydawnictwo Morskie, 1986, pp. 191-207.

bility of teaching Kashubian at school, as well as the processes of ennoblement of Kashubian culture in many spheres of public life (liturgy in the Catholic Church, Kashubian as an auxiliary language in state administration, the emergence of Kashubian as an academic language). The second, the great popularity of theatre competitions and reviews for children, which were organised in various places in Kashubia. The competitions gathered several groups presenting themselves during one edition of the event and were prepared by a large number of teachers and instructors who promoted Kashubian culture. The third is lack of up-to-date repertoire for children's theatre groups performing in the Kashubian language. This factor was felt quite strongly, as in the situation of the 21st century, it was difficult to confidently present on stage plays that were adaptations of literature written several decades earlier²⁵.

The editors of Kashubia's most important periodical, «Pomerania» decided to remedy the shortage of plays and in 1997 launched a competition for Kashubian-language theatre works aimed at young audiences. In response, theatrical scripts of short stage forms written by teachers and writers appeared. «Pomerania»'s organisers decided to publish the best pieces, and thus the magazine published plays by Sabina Drywa *Kaszëbskô Wilëjô*²⁶ [*Kashubian Christmas Eve*], Eugeniusz Gołąbek *Nawrócenie Króla Tirana*²⁷ [*The Conversion of King Tiran*], Brygida Bulczak *Wigilijné Ôpòwiôstczi*²⁸ [*Christmas Eve stories*], and Maria Mach *Gwiôzdkka Dlô Dzôtków*²⁹ [*Christmas Eve for Children*]. All of the above-mentioned works enriched the repertoire of school theatre groups. What they had in common was a similar religious and ritual sphere of Christmas and New Year. What was lacking here, however, were other pieces that were associated with everyday life, school life or customs.

The plays published at the end of the 20th century were supported by the work of Ida Czaja (born 1968), a poet, translator, teacher, and amateur actress who wrote short plays for children's theatre groups. In 2005, she published a collection of miniatures entitled *Obrôzczi na Binã* [*Pictures for the stage*], in which one can find more thematically diverse works³⁰. On the one hand, there are still religious and ritual plays such as *Drama ò Bòzim Narodzenim* [*The Christmas Play*] or *Gwiżdż. Szpetôczél z óflama* [*Gwiżdż. A Play with Jokes*], which touch upon folk customs taking place around Christian holidays. On the other hand, however, there are miniatures showing different contexts, e.g., ludic forms praising the values of goodness and diligence and criticising the

²⁵ Description of ideological and artistic transformations in Kashubian literature of the early 21st century: D. Kalinowski, A. Kuik-Kalinowska, *Literatura kaszubska. Rekonesans / Kaszëbskô lëteratura. Wëzdrzënë*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 2017.

²⁶ S. Drywa, *Kaszëbskô Wilëjô*, «Pomerania», n. 2, 1997, pp. 24-30.

²⁷ E. Gołąbk, *Nawrócenie króla tirana*, «Pomerania», n. 1, 1998, pp. 28-33.

²⁸ B. Bulczak, *Wigilijné ôpòwiôstczi*, «Pomerania», n. 11-12, 1998, pp. 45-48.

²⁹ M. Mach, *Gwiôzdkka dlô dzôtków*, «Pomerania», n. 12, 2000, pp. 40-41.

³⁰ I. Czajinô, *Obrôzczi na binã*, Gdańsk, Czec, 2005.

vices of stupidity and laziness, e.g., *Za co Bòcòn bét ùkòróny* [*What the stork was punished for*]. The most interesting are stage images related to Kashubian legends and tales, e.g., *Jak môlinczi spiéwòk kaszëbsczi do nieba sã dostòł* [*How a Tiny Kashubian Singer Got to Heaven*], in which one can find elements of regional and ethnic identification. For a child audience, the opportunity to see on stage elements of the Kashubian landscape and characters known not from world or Polish literature, but from the stories of parents or grandparents, is a significant act of ennoblement of native tradition. Czaja, as an author, was also open to non-Kashubian literature, which is why she also adapted classic fairy tales by Christian Andersen, such as *Dzëwczã ze sztrëcholzama* [*The Little Girl with Matches*] and *Brzëdcki kaczcëlc* [*The Ugly Duckling*], into a theatrical form expressed in Kashubian. In doing so, she showed that the Kashubian language is a medium that can take on emotions and thoughts formulated in other languages.

Ida Czaja's theatrical proposals were followed by new stage works for young audiences already in print in the 21st century. This phenomenon is documented in the Kashubian-language publication supplement to «Pomerania» – «Stegna». It is in this quarterly that stage miniatures were published, e.g., by Teresa Wejer³¹, Sabina Drywa, Joanna Chaber³² and the youngest of the authors – Natalia Kuczkowska and Kornelia Wica³³. Scripts for children's plays also appeared in the Kashubian-language literary anthology *Zymk*, in which Kashubian language teacher and poet Anna Bartkowska-Rózek printed several stage miniatures³⁴.

The publication of plays in magazines or anthologies gave Kashubians the feeling that the situation with drama aimed at a children's audience was improving. However, there was still a lack of a major publication that included more scripts. Such a move had already been made in terms of dramas for an adult audience – a collection entitled *Domòcò bina*³⁵ was published in 2006, and another compilation entitled *Spòd strzechë na binã*³⁶, in 2011. However, there was no comprehensive publication with works for children and young people.

The situation changed in 2012, when a collection of nearly 30 scripts by

³¹ E.g.: T. Wejer, *Diòbelsczë zelëskò. Widzawiszczë òpiarté na bójce pòdlug Jerzégò Sampa*, «Stegna», n. 2, 2007, pp. 22-27; Ead., *Historiò ò Bòzim Narodzenim*, «Stegna», n. 4, 2008, pp. 16-19; Ead., *Pieczelnò narada*, «Stegna», n. 4, 2009, pp. 21-23; Ead., *Ò trzech bracynach*, «Stegna», n. 2, 2011, pp. 17-19; Ead., *Krësztofówé rozegracje*, «Stegna», n. 2, 2013, pp. 10-11.

³² S. Drëwa, J. Chaber, *Wëbróné scenë z zëcò Floriana Cenòwë (òpòwiedzónë ze szpòrtã)*, «Stegna», n. 4, 2011, pp. 18-23.

³³ N. Kuczkòwskò, K. Wica, *Dze Bóg ni mòże, tam Òn... – to je jaselka jinaczi*, «Stegna», n. 4, 2012, pp. 2-9.

³⁴ A. Bartkòwskò, *Kaszëbsczë jaselka*, «Zymk», vol. 6, 2007, pp. 8-12; Ead., *Jaselka*, «Zymk», vol. 8, 2009, pp. 52-59.

³⁵ Lipuski, Pisarek (edd.), *Domòcò bina. Dziewiãc dramów do jigrë*, cit.

³⁶ Ugowska (ed.), *Spòd strzechë na binã. Antologiò kaszëbsczi dramë*, cit.

Elżbieta Pryczkowska, Teresa Wejer, and Dorota Formela was published under a common title, *W Krójnje Grifa [In the Land of the Gryphon]*³⁷. The published material was not so much artistic as didactic in purpose; it was to be used not so much by directors or theatre managers as by language teachers and animators of Kashubian culture. In this way, the playwrights envisaged their proposals to be primarily vehicles for Kashubian language, history, and ethnography, assuming that the performers of the text were able to recite, knew basic acting techniques, sang and danced. This type of theatre has become very helpful in school lessons or during artistic special events (e.g., Mother's Day or Kashubian Unity Day)³⁸.

A puzzling issue in the case of the collection of scripts mentioned here is the fact that the authors of the texts are female teachers. From a sociological point of view, this indicates a feminisation of the Kashubian school environment. Assessing this in educational terms, one can see in the activity of female teachers a specific model of education, in which they maintain the inherited tradition, diversify it, and promote it through theatre. Among the stage works of the collection in question, one senses particularly strongly the concern to bring out in the child and adolescent spectator-actor an emotional charge that supports the student on the further path of identity development. Emphasis on the young person's sensitivity means designing the work in such a way that the most important thing is to show scenes that appeal to the emotions and less to the intellect³⁹.

In the collection of scripts under discussion, the stage works can be divided into several thematic and stylistic groups. The first set includes works based on Kashubian folk tradition (Kashubian identity myths, characters from folk imagination). The second group consists of forms related to church holidays associated with Kashubian rituals (Christmas, Easter). The third group is made up of scenarios related to traditional and universalistic fairy tales and fables, which contain images of good or evil, wisdom or stupidity. The fourth set of works are stagings of occasional celebrations (Mother's and Father's Day, Teacher's Day, Day of Kashubian Unity). Finally, the last of the thematic and stylistic circles of this collection brings together cabaret and satirical texts.

³⁷ E. Pryczkowska, T. Wejer, D. Formela, *W krójnje Grifa. Têatrowé scenarniczzi*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 2012.

³⁸ J. Treder, *O pięknie kaszubszczyzny*, in *Jak recytować po kaszubsku. Materiały metodyczne*, Chmielno, Zrzeszenie Kaszubsko-Pomorskie, 1979; B. Cirocki, *Konkursy recytatorskie w Chmielnie*, in J. and J. Treder (edd.), *Domôcé słowo zwęczné. Antologia tekstów kaszubskich dla recytatorów*, Chmielno, Zrzeszenie Kaszubsko-Pomorskie, 1994, pp. 129-143.

³⁹ At this point, it is important to refer to separate studies showing the relationship between education and theatre in the Polish cultural situation of the 1990s, when the Kashubian theatre movement was revived: M. Gliniecki, L. Maksymowicz (edd.), *Teatr a dziecko specjalnej troski*, Słupsk, Wydawnictwo Akademii Pomorskiej, 1999; M. Gliniecki, L. Maksymowicz (edd.), *Teatr edukacyjny – komunikacja bez granic*, Słupsk, Wydawnictwo Akademii Pomorskiej, 2001.

Let us take examples from the first group of scripts, in which there are references to Kashubian legends, tales, and myths. Particularly interesting here is Dorota Formela's play *Dôwno témù na Kaszëbach* [*Long Ago in Kashubia*], in which we encounter the convention of theatre within theatre and shadow theatre. Characters from Kashubian folk texts appear here in just a few scenes: Stolems, the krośnięta [miniature fantasy beings acting as guardian spirits of the household], the princess, the farmhand, and the devil. The second author of the script, Teresa Wejer, published a more extensive script, drawing on the classics of Kashubian literature and adapting the texts contained in Bernard Sychta's academic *Dictionary of Kashubian Dialects*⁴⁰, specifically on the fantastic character of Borowa Ciotka [Kashubian benevolent spirit of the forests and protector of forest animals]. Thanks to this, Wejer's stage miniature points to both the advantages of an ecological approach to nature and evokes elements of Kashubian identity myths (the figure of the Kashubian wanderer – Remus, three demons making it impossible to achieve existential happiness).

Among the examples of the second group of scripts thematically linked to Kashubian rituals and Christian holidays, one can name the proposal by Elżbieta Pryczkowska, whose work entitled *Gwiôzdzka z Nieba* [*Christmas from Heaven*] is an apt reference to regional tradition, with the recognisable characters of Gwiazdzka [as Christmas Greetings], Dziad i Baba [*a Strawman and a Hag*], Chimney Sweep, a Bear and a Goat, who speak both about the moral sides of life and joke about everyday life events. Another author, Teresa Wejer, presented a script entitled *Dëgùsë* [*The Lashing*] based on Easter customs. The scenes show the ritual behaviour of girls and boys during the second day of the holiday, when in Kashubia young people smack each other with conifer bush twigs, which is supposed to bring health, good luck with the opposite sex, and material wealth.

The third circle of scripts, containing typical didactic and moralistic fairy tales and fables, is marked by the works of Dorota Formela, out of which stands out a miniature entitled *Pamiãtôj ò spikù* [*Remember the Dream*]. This is an instructive and, at the same time, formally well-composed stage story about a father who treats other people in a selfish manner and a mother who constantly gossips. It is only the son of this marriage, disgusted by his parents' behaviour, who breaks with his negative behaviour and decides to live a noble life. Unusual for the content of traditional Kashubian fairy tales, the author of the work criticises the adult generation, assigning qualities to young people. A formally different solution is proposed by Elżbieta Pryczkowska in her script entitled *Farwë żëcégò* [*Colours of Life*], in which she depicts the fate of fishermen, the dangers of work at sea, and love in the family circle. Songs, skilfully woven into the sequence of stage events and dividing the play into successive

⁴⁰ B. Sychta, *Słownik gwar kaszubskich na tle kultury ludowej*, 7 vols., Wrocław, Zakład Narodowy im. Ossolińskich, 1968.

scenes, are a great asset to this play. This creates a theatrical and musical spectacle, which has a suggestive effect on young audiences.

The fourth group of stage works written for non-artistic reasons is filled with scripts by Elżbieta Pryczkowska in the collection under discussion here. Some of them are scenic elaborations of dialogues that could occur during school celebrations of Mother's Day and Father's Day (*Dlô Mëmë i Tatka* [For Mother and Father]) or Grandmother's Day and Grandfather's Day (*Starków rada. Dżéń Starczy i Starka* [Grandparents' Council. Grandmother and Grandfather's Day]). The author also conceived a script entitled *Dżéń Jednotë Kaszëbów* [Day of Kashubian Unity], which is a stage picture aimed at showing children's characters explaining to each other where their cultural identity comes from and what is the significance of the festival of communal living. Pryczkowska's scripts *Kaszëbsczy Biskùp Swiāti* [Holy Kashubian Bishop] and *Brzòd żécégò Jana Trepczika* [The Fruit of Jan Trepczyk's Life] are also ideologically important for the specificity of the Kashubian school. Both drama sketches acknowledge outstanding Kashubian personalities important for the formation of regional consciousness. The first one takes on a hagiographic dimension, portraying the sainthood of Bishop Konstantin Dominik (1870-1942). The second is heroic in profile, depicting the patriotic activities of Jan Trepczyk (1907-1989).

The last group of topics in this collection is made up of scenarios that could become the framework for school cabaret or satirical programmes. Teresa Wajer is very good here with her scenes entitled *Kabarët: Przezérk módë* [Cabaret: Fashion Show], thanks to which we can watch a funny clash between the mentality of people from the Kashubian countryside and the reality of a fashion show at a seaside resort. Satirical forms are also practiced by Elżbieta Pryczkowska, who in her humoresque *Wëbòrë miss* [Miss Election] parodies the environment of people organising female beauty pageants, satirising all participants in the events: both the candidates and the jurors.

The collection of theatrical scripts discussed here, *W kròjnie Grifa*, is not the only example of the revival of creators that has emerged in the 21st century. In the recent decades of the development of Kashubian drama in terms of works for young audiences, the strongest position has been built up by Felicja Baska-Borzyszkowska (born 1942). She is a teacher of Kashubian and Polish language, a writer and a publicist. In 2013, she published a set of texts of plays and theatre pictures entitled *Ûsòdzczy na wdòr* [Works to Remember]⁴¹. In this collection, the content emphasis was placed on the didactic and moral dimension of the plays, which affects the lack of imaginative formal and artistic treatments in them. This was because the author, as a theatre person, gave up

⁴¹ F. Baska-Borzyszkowska, *Ûsòdzczy na wdòr*, Gdańsk, Zrzeszenie Kaszubsko-Pomorskie, 2013.

her ambitions as a dramatist to become a teacher of Kashubian culture and a pedagogue.

Baska-Borzyszkowska divided her works into several thematic groups, giving them specific functions and meanings. There are forms that were created for the following purposes: appreciation of classic works of Kashubian literature, adaptation of literary works, enrichment of ethnographic exhibitions, presentation of folk customs and rituals, presentation of the beauty of the Kashubian land, commemoration of Kashubian authors and activists, enrichment of school celebrations, and theatrical presentations for state, church, or regional occasions. One or several small dramatic forms appear in the collection within the framework of the above-mentioned compositional particles. Sometimes they look like miniatures and are a few or several pages in length, with a small number of performers and abbreviated didascalia. Sometimes, however, they are theatrical adaptations of a literary text or can be regarded as stage montages of several different works or fragments thereof.

Let us take a closer look at just a few of Baska-Borzyszowska's plays. Here is a piece entitled *Słowa malowóné akwarelama* [*Words Painted with Watercolours*], which the author intended for presentation to secondary school students. It is a spoken-word montage based on the essays of Stanisław Pestka (1929-2015). It features four reciters who speak texts from a selection of Pestka's reflections on New York, a city that is admittedly great, but at the same time alien to agrarian Kashubian culture. Alongside the recitations, illustrations from the book edition of the essays are projected onto a projector as a kind of commentary to the spoken words. What the author of the montage gains in the end is that young people hear ambitious Kashubian prose and poetry, and furthermore young people see that Kashubian is used not only to express thoughts and feelings about the immediate native landscape, but also to respond to the challenges of the modern world.

Another example of a script from Baska-Borzyszowska's collection was dedicated to the First and Second World Wars. The work *Dzejowi spiéw* [*The Song of History*] features the lyrics of several Kashubian poets: among others, Józef Ceynowa (1905-1991), Stefan Fikus, Alojzy Nagel (1930-1998), as well as fragments of journalistic works. The Reciters and the Guide who appear on stage recall the works of the aforementioned poets and give chronological order to the play. The historical events are given in abbreviated form with single images. At the end of the stage montage, the songs appear as acts of hope and faith in a better future. Here, the author of the script touches on the complex subject of war, making the young audience of the play aware of the Kashubian road to freedom.

Such a clearly didactic approach to Kashubian theatre for young audiences does not always produce positive results, as can be seen in the play *Sobòtka w Krëbanowie* [*Sobòtka in Krebane*]. On the one hand, an interesting cognitive effect is achieved here, as it is shown how the school community has the

opportunity to get to know each other better and integrate thanks to a group march on a sightseeing trip. Young people do this as well by learning about the texts of a classic of Kashubian literature by Jan Karnowski. On the other hand, however, the author's idea of having a literary figure, i.e., Karnowski himself, explain the meaning of the recited works to the audience in the language of a school discussion is not convincing. Also unsuccessful is Baska-Borzyszkowska's scenario *Ųtwórcë – jich sparłãczenië z mola* [*Artists – their Relationship with the Place*], which was intended by the author to arouse a sense of ethnic pride in the audience. On the one hand, the author used her knowledge of the geography of the birth of Kashubian writers very well and made the audience aware of the fact that Kashubian literature was created not in some distant place but sometimes in the immediate vicinity. On the other hand, however, giving a lot of biographical information from the stage overwhelms and discourages people from learning about the writers' work.

The collection of plays by Felicja Baska-Borzyszkowska vividly demonstrates the specificity of Kashubian-language plays for young audiences. Above all, they are didactic and moralistic and have therefore been subordinated by the playwrights to perform a role that is not always linked to the artistic dimension⁴². Metaphor and understatement seldom appear here, and most often there is an unambiguous moral teaching. Another feature of Kashubian theatrical proposals for children is the small form, usually one act consisting of short stage images. Rarely do playwrights decide to build larger compositions, as if they assume that the young audience will not be able to hold their attention. Still another issue is the pictoriality of the plays referred to, which is clearly not a sign of weakness in the content or composition of the plays. However, the overuse of this artistic device makes the Kashubian viewer almost unacquainted with other theatrical techniques that could add variety to the intellectual layer of the play.

Conclusions

The authors of the collections of scripts discussed here believe that theatre is an outstanding way of shaping young people's sensitivity, developing their ability to work in a group and, finally, gaining a deeper knowledge of reality. The world of theatre, through its ability to evoke a mood of joy, sympathy, and respect, as well as an atmosphere of sadness, dislike, or disapproval, supports the formation of a personal attitude towards the outside world. Dramaturgical

⁴² This feature of scripts can be considered as a result of their use in schoolwork. This type of situation is discussed in relation to other languages: P. Howell, B.S. Heap, *Planning Process Drama. Enriching teaching and learning*, London-New York, Routledge, 2013.

techniques can also show awareness and ethnographic evidence of the spiritual culture of Kashubia in a way that is attractive to a school audience. Pryczkowska, Wejer and Formela want to develop habits of perception of stage art and hope that this will result in participation in theatre life when the audience-children become adults. These authors – which is worth emphasising – derive this style of thinking from the fact that they are also teachers of the Polish language, and so they refer to scenarios present in the Polish cultural circle⁴³. Baska-Borzyszkowska is of a similar opinion, but her proposals for children are schematic in the textual layer and cautious in their references to theatrical symbols and metaphors. The author rarely allows young viewers to go beyond the position of passive spectator of a series of images. The occasional situation arises when she addresses the sensitivity of a young person and allows them to empathise with the character. Teresa Wejer is the most consistent of the contemporary authors of plays for children with this type of approach. She takes a creative approach to what has hitherto been handed down from oral or literary Kashubian tradition and leads stage events not only towards linguistic or cultural education, but also towards the qualities of play and such theatrical means as scenography and dance.

When, in 1919, a group performed patriotic and satirical repertoire for adults in Kashubian for the first time, no one in the audience expected that there would ever be a need to present plays for children or young people. After World War II, there were some plays aimed at this type of audience, but they were written in Polish (Lech Bądkowski⁴⁴, Franciszek Fenikowski⁴⁵, Natalia Gołębska⁴⁶) by Polish authors fascinated by Kashubia. Although Kashubian-language plays were being written at the same time (and earlier), none of the Kashubian-language playwrights of the time thought of a juvenile audience. It was not until the 1980s that the above-discussed Stefan Fikus and Aleksy Pepliński began to sense this, and their scripts partly fulfilled the cultural ambitions of the Kashubian community. However, it was only in the 21st cen-

⁴³ Polish-language theatre scripts useful for schoolwork can be mentioned at this point; e.g. M. Nawrocka, *24 odstony szkolnego teatru. Scenariusze przedstawień okolicznościowych*, Warszawa, Wydawnictwo Adam, 2004; A. Miś, *Korale czyli Przygoda Jasia. Scenariusz przedstawienia dla dzieci przedszkolnych na Dzień Matki*, Kraków, Wydawnictwo WAM, 2011; J. Wróblewski, J. Szczerba, *Leśne tajemnice. Scenariusz widowiska o tematyce ekologicznej (monologi, piosenki, dialogi), przeznaczonego dla młodych widzów-dzieci i młodzieży...*, Kielce, Ośrodek Pomocy Dzikim Zwierzętom, 2011.

⁴⁴ D. Kalinowski, *Między moralitetem a baśnią. Dramaty Lecha Bądkowskiego*, in D. Kalinowski (ed.), *Lech Bądkowski. Literatura i wartości*, Bytów-Słupsk-Gdańsk, Instytut Kaszubski, Zrzeszenie Kaszubsko-Pomorskie, 2009, pp. 129-141.

⁴⁵ Id., *Historia i zabawa na pomorskim brzegu. O dramaturgii Franciszka Fenikowskiego*, in D. Kalinowski (ed.), *Franciszek Fenikowski. Kaszuby na nowo opisane*, Słupsk-Gdańsk, Akademia Pomorska, Instytut Kaszubski, 2012, pp. 121-170.

⁴⁶ Id., *Tematy, techniki i konteksty dramaturgii Natalii Gołębskiej*, «Nasze Pomorze. Rocznik Muzeum Zachodniokaszubskiego w Bytowie», n. 17, 2015, pp. 115-126.

tury, barely 20 years ago, that the Kashubian tradition gained a new quality through drama aimed at young audiences. This type of work is in the process of development, strongly influenced by the external social situation and the desire to support itself with plays in the primary or secondary school teaching process. What is missing, however, is plays that present young audiences with a different type of problem, less related to the school sphere and more to everyday life, family relationships and peers. While Kashubian authors of prose or lyric works for young readers now write in similar techniques and touch upon similar themes, as is the case in other national literatures of Europe⁴⁷, playwrights still refer to the old, pre-war understanding of art⁴⁸. At present, therefore, it can be seen that Kashubian dramaturgy still faces thematic and artistic limitations. However, the phenomena of the development of Kashubian playwriting for adults leads us to believe that positive changes will soon take place in the circle of authors of plays for children and young audiences⁴⁹.

⁴⁷ Id., *Kashubian literature for children. Historical and literary notes*, «History of Education & Childrens Literature», vol. XVIII, n. 2, 2023, pp. 165-178.

⁴⁸ Z. Mrozek, *Kaszubsko-pomorska dramaturgia w dwudziestoleciu międzywojennym*, in J. Konieczny (ed.), *W kręgu Adama Grzymały-Siedleckiego i dramaturgii polskiej*, Bydgoszcz, PWN, 1970, pp. 125-144; D. Żebrowska, *Realia obyczajowe i historyczne w dramaturgii kaszubskiej w latach 1920-1939*, «Rocznik Gdański», n. 2, 1986, pp. 295-309.

⁴⁹ D. Kalinowski, *Dramaturgia kaszubskojęzyczna. Od pierwocin do dziś*, in M.J. Olszewska, K. Samsel, A. Skórzewska-Skowron (edd.), *Dramat słowiański. Próba zbliżenia, przekroje, (re)konstrukcje i (re)lektury*, Warszawa, Wydział Polonistyki UW, 2021, pp. 131-146.

*Scientific News and
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**Cronache scientifiche
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La storia dell'educazione tra bilanci storiografici, prospettive metodologiche e visioni comparative: la costruzione di un'agenda condivisa tra Italia e Argentina (Macerata, 16-17 settembre 2024)

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The history of education between historiographical assessments, methodological perspectives and comparative visions: the construction of a shared agenda between Italy and Argentina (Macerata, 16-17 September 2024)

ABSTRACT: This contribution aims to retrace the results of the 1st Italian-Argentine Workshop on the History of Education held at the University of Macerata on 16 and 17 September 2024, entitled: *The history of education between historiographical assessments, methodological perspectives and comparative visions: the construction of a shared agenda between Italy and Argentina*. The workshop was organized by the Center for Documentation and Research on the History of School Books and Children's Literature (CESCO) of the University of Macerata and by the Argentine Society for Research and Teaching in the History of Education (SAIEHE), with the patronage of the Italian Center for Historical-Educational Research (CIRSE) and the Italian Society for the Study of Historical-Educational Heritage (SIPSE). This important scientific meeting sought to establish lasting academic ties between scholars and researchers from both countries, with the aim of promoting historical studies in the educational field, sharing historiographical assessments, methodological lines, archival excavations and comparative visions between the two academic traditions.

EET/TEE KEYWORDS: History of Education; Comparative studies; Historiography; Italy; Argentina; XX-XXI Centuries.

Un importante momento di confronto sugli sviluppi della storiografia educativa in Italia e in Argentina in età contemporanea. Il 16 e 17 settembre 2024,

presso il Polo Pantaleoni dell'Università di Macerata, si è svolto il 1° Workshop italo-argentino di storia dell'educazione dal titolo *La storia dell'educazione tra bilanci storiografici, prospettive metodologiche e visioni comparative: la costruzione di un'agenda condivisa*, che ha avviato una seria e si spera proficua collaborazione tra le comunità accademiche italiane e argentine di storia dell'educazione.

L'obiettivo di questa iniziativa di studio, promossa dal Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia (CESCO)¹ del Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo e sotto il patrocinio del Centro Italiano per la Ricerca Storico-Educativa (CIRSE) e della Società Italiana per lo studio del Patrimonio Storico-Educativo (SIPSE), è stato quello di stabilire legami accademici duraturi tra studiosi e ricercatori di entrambe le sponde dell'Atlantico, allo scopo di favorire lo sviluppo degli studi storici in ambito educativo, condividendo bilanci storiografici, linee metodologiche, scavi archivistici e visioni comparative tra le due tradizioni accademiche.

I lavori della due giorni maceratese, che ha visto la partecipazione di illustri relatori, provenienti da numerosi atenei italiani e argentini, sono stati aperti dai saluti istituzionali del Rettore dell'Università di Macerata, John McCourt, dalla Direttrice del Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo, Lorella Giannandrea, dal Presidente della Società Argentina per la Ricerca e l'Insegnamento della Storia dell'Educazione, Nicolás Arata, dalla vice Presidente del Centro Italiano per la Ricerca Storico-Educativa, Caterina Sindoni (oggi presidente dello stesso Centro), dalla Presidente della Società Italiana per lo studio del Patrimonio Storico-Educativo Anna Ascenzi e dalla Delegata CUIA – Consorzio inter-Universitario Italiano per l'Argentina Amanda Salvioni (Università di Macerata). Nicolás Arata e Juri Meda (tra i principali promotori dell'evento insieme ad Anna Ascenzi e Luigiaurelio Pomante), nel successivo intervento di introduzione ai lavori, *Ragioni e obiettivi del workshop italo-argentino di storia dell'educazione*, hanno ripercorso i legami profondi esistenti tra Italia e Argentina non solo in ambito culturale ma anche educativo, da sempre caratterizzati da reti basate su dialoghi e scambi, frutto di spostamenti e contatti tra individui e comunità pedagogiche che hanno fatto circolare conoscenze, metodologie ed esperienze da una parte all'altra dell'oceano.

La prima parte del convegno è stata moderata da Gabriela Lamelas (Universidad Nacional de Córdoba) e ha visto l'intervento congiunto di Gianfranco Bandini e Stefano Oliviero (Università di Firenze) sul fronte italiano, seguito da quello di Eda Gelmi (Universidad Nacional de Córdoba) su quello argentino, sul tema *Le fonti orali: prospettive metodologiche e sfide euristiche in*

¹ Per un resoconto delle numerose attività promosse dal centro di ricerca si rimanda al sito web <www.unimc.it/cescom/it> (ultimo accesso: 12.02.2025).

*Italia e Argentina*². In entrambe le relazioni è stata evidenziata la necessità di conservare la memoria sotto forma di fonte orale per documentare quanto accaduto nel passato all'interno delle scuole o in altri contesti educativi, con particolare riferimento alle prassi didattiche, alle consuetudini quotidiane di insegnanti e studenti, ai costumi educativi e ai rituali scolastici, che spesso non sono altrimenti attestati. Anche il contesto digitale, sia in Italia che oltre oceano, rappresenta oggi, in piena rivoluzione tecnologica, una imprescindibile fonte narrativa poiché attraverso siti, blog e quant'altro, si possono raccogliere testimonianze utili a ricostruire momenti significativi del passato.

Sul tema *Le fonti iconografiche: prospettive metodologiche e sfide euristiche in Italia e Argentina*³, il brillante intervento di Luana Salvarani (Università di Parma) ha mirato a sottolineare il fondamentale ruolo delle immagini come fonti volontarie e involontarie. Queste ultime, tuttavia, possono risultare – come nel caso di foto o disegni fatti per caso – di difficile interpretazione, in quanto non esiste alla base un messaggio preciso da voler comunicare. Eduardo Galak, invece, (CONICET/Universidad Nacional de La Plata) trattando dello stesso tema ha evidenziato l'importanza assunta negli anni più recenti dal cinema quale fonte preziosa per la ricerca storico-educativa⁴. I film documentario, il cinema muto, il cinegiornale: da essi si può estrapolare informazioni. I cinegiornali durante il secondo conflitto mondiale svolgevano un compito informativo di natura documentaristica; il governo utilizzava questo strumento come veicolo di propaganda nazionale.

A proseguire le relazioni sul tema *Le fonti archivistiche: prospettive metodologiche e sfide euristiche in Italia e Argentina*⁵ sono state Evelina Scaglia (Università di Bergamo) per il contesto italiano e Javiera Díaz (Archivo Pedagógico Cossettini, IRICE – CONICET/Universidad Nacional de Rosario), María Eugenia Guida (Universidad Nacional de Rosario) e María Elisa Welti

² Sulle fonti orali si ricordano 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. 2, pp. 539-560; 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; S. Oliviero, G. Bandini, *Memorie Educative in Video*, 2 voll., Firenze, Edizioni Forlilpsi, 2021-2022.

³ Sulle fonti iconografiche si veda il recente S. Polenghi, *Educational Tools in History. New Sources and Perspectives*, Roma, Armando, 2024. Utili anche il numero monografico curato da Bernat Sureda Garcia e Maria del Mar del Pozo Andrés dal titolo *Images of the European Child*, «History of Education & Children's Literature», vol. XIII, n. 1, 2018, pp. 11-352. nonché il contributo di I. Dussel, K. Priem, *The Visual in Histories of Education: a reappraisal*, «Paedagogica Historica», vol. 53, n. 6, 2017, pp. 641-649.

⁴ Sull'importanza del cinema e della televisione quale fonte per la ricerca storico-educativa si veda P. Alfieri (ed.), *Immagini dei nostri maestri. Memorie di scuola nel cinema e nella televisione dell'Italia repubblicana*, Roma, Armando editore, 2019.

⁵ Sulle fonti archivistiche si veda il sempre valido P. Carucci, *Le fonti archivistiche: ordinamento e conservazione*, Roma, Carocci editore, 1999.

(Universidad Nacional de Rosario) per quello argentino. Secondo quanto presentato nel suo intervento la Scaglia ha sottolineato come negli ultimi due decenni in Italia gli studi intorno al patrimonio storico-educativo abbiano subito una vera rivoluzione storica di ricerca sia nel modo di insegnare che nel pensiero pedagogico, creando una prospettiva storiografica fondata sempre più sulla ricerca archivistica, con la possibilità tuttavia di utilizzare molteplici tipologie di fonti. Queste “innovazioni” hanno permesso di evitare una semplificazione e interpretazione a volte anche ideologica della storia, errore nel quale in passata era incappata una buona parte della storiografia di settore. Tra le fonti materiali analizzate invece dalle studiose argentine ci sono state soprattutto le lettere di Olga Cossetini, figlia di immigrati italiani nella provincia di Santa Fé nonché maestra in una scuola per figli di immigrati italiani in Argentina, la quale ha comunque continuato a coltivare i contatti con la scuola e l'educazione pedagogica italiana, soprattutto grazie ai suoi rapporti epistolari con Lombardo Radice.

Nell'ultima sessione a parlare de *Le fonti materiali: prospettive metodologiche e sfide euristiche in Italia e Argentina*⁶ sono intervenute Maria Cristina Morandini e Francesca Davida Pizzigoni (Università di Torino) e a seguire María Silvia Serra (IRICE – CONICET/Universidad Nacional de Rosario) María Claudina Blanc (CONICET/Universidad Nacional de Rosario) e Daniela Cattaneo (CONICET/Universidad Nacional de Rosario) in un interessante intervento congiunto. Per il contesto italiano Maria Cristina Morandini e Francesca Davida Pizzigoni hanno concentrato la propria ricerca sulla materialità scolastica che ormai da alcuni è oggetto di un rilevante interesse da parte della storiografia educativa. Come ben illustrato dalle relatrici sono stati tre i punti di partenza dai quali si sono mosse le principali ricerche: quello dei grandi progetti nazionali a cui centri di ricerca esistenti nei diversi atenei hanno e stanno lavorando congiuntamente; quello relativo all'attività dei singoli ricercatori che hanno individuato interessanti ed anche innovativi filoni ricerca; e l'attività che muove dalle iniziative dei grandi e piccoli musei, solitamente musei universitari che raccolgono materiale oggetto di studio. Sul fronte argentino, invece, l'attenzione è stata focalizzata soprattutto sulla città di Rosario e sul suo patrimonio storico-educativo, archivistico ed architettonico, che è stato oggetto nel corso dell'ultimo trentennio di notevoli studi da parte degli storici dell'educazione ma non solo.

La prima giornata del convegno maceratese si è quindi conclusa con la visita al Museo della Scuola «Paolo e Ornella Ricca» dell'Università Macerata,

⁶ Sulla cultura materiale della scuola tra i lavori più recenti si rimanda a J. Meda, «Mezzi di educazione di massa». *Nuove fonti e nuove prospettive di ricerca per una «storia materiale della scuola» tra XIX e XX secolo*, Milano, FrancoAngeli, 2016 e a S. González, J. Meda, X. Motilla, L. Pomante (edd.), *La Práctica Educativa. Historia, Memoria y Patrimonio*, Salamanca, FahrenHouse, 2018.

condotta da Fabio Targhetta e Marta Brunelli, rispettivamente direttore e vicedirettrice della struttura museale maceratese. Agli ospiti è stato dunque presentato il nuovo allestimento dei locali di Via Carducci di una realtà esistente già dal 2009 e che si è lentamente affermata come un punto di riferimento imprescindibile tra i musei della scuola della Penisola⁷.

La seconda sessione dei lavori ha avuto come tema trainante l'intento di tracciare un *Bilancio sulla ricerca storico-educativa attuale: analogie e differenze tra Italia e Argentina* ed è stata coordinata da Elisabetta Patrizi (Università di Macerata,) la quale, dopo aver offerto interessanti stimoli sulle possibili prospettive che la ricerca storico-educativa è in grado oggi di offrire, ha ceduto al parola ad Anna Ascenzi e Lucia Paciaroni (Università di Macerata), le quali hanno presentato un ricco ed esaustivo *Bilancio sulla storia della letteratura infantile in Italia*⁸. Le relatrici hanno sottolineato in particolare come la storia della letteratura per l'infanzia abbia conosciuto nell'ultimo ventennio in Italia un intenso sviluppo grazie al crescente spazio che la disciplina ha acquisito in ambito accademico e all'interno del macrocosmo della storia dell'educazione. In particolare, alcune recenti pubblicazioni, abbandonando quella prospettiva quasi esclusivamente letteraria che per lungo tempo aveva contraddistinto taluni studi sulla letteratura per ragazzi condotta in ambito umanistico, hanno centrato il proprio *focus* proprio sulla storia della letteratura dell'infanzia in età contemporanea cercando di ricostruire, proprio attraverso lo studio dei testi, quei processi educativi in atto strettamente collegati ai contesti sociali e culturali in cui essi nascevano e si sviluppavano.

Di rilevante interesse storiografico anche l'intervento proposto da Luigiaurelio Pomante (Università di Macerata) e Sofia Montecchiani (Università di Chieti-Pescara) che ha presentato con dovizia di particolari un puntuale e rigoroso *Bilancio sulla storia dell'università in Italia*⁹. In particolare, la relazione, ripartendo dai primi anni del Novecento, quando fu costituito a Bologna il

⁷ Sul Museo della Scuola «Paolo e Ornella Ricca» dell'Università Macerata si veda il contributo di S. Montecchiani, *La promozione e la valorizzazione del patrimonio storico-educativo: l'esperienza del Museo della Scuola «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata*, «Annali di storia delle università italiane», vol. 25, n. 1, 2021, pp. 199-208.

⁸ Sul nuovo approccio storiografico relativo alla 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 & Pensiero, 2002; A. Ascenzi, R. Sani, *Storia e antologia della letteratura per l'infanzia*, 2 voll., Milano, FrancoAngeli, 2017-2018; ma anche il sempre valido P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2020.

⁹ Per una rassegna storiografica degli studi di storia dell'università in Italia si vedano L. Pomante, *Between History and Historiography. Research on Contemporary Italian University*, Macerata, eum, 2014; Id., *Las investigaciones sobre la historia de las universidades en Italia. Un balance historiográfico del siglo pasado*, «CIAN-Revista de Historia de las Universidades», vol. 20, n. 1, 2017, pp. 163-192 ma anche il più recente S. Montecchiani, *Studies on the History of the University and Higher Education in Italy: between Historiographical Review and New Research Perspectives*, «History of Education & Children's Literature», vol. 19, n. 2, 2024, pp. 467-486.

primo centro per la storia dell'Università, ha ripercorso circa un secolo di storiografia universitaria sottolineando soprattutto la "rivoluzione" in tal senso registrata a partire dall'ultimo decennio del Novecento. Proprio sul finire del secolo scorso, infatti, il dibattito storiografico sulle università e sull'istruzione superiore ha conosciuto una nuova e feconda stagione. In modo particolare si è registrato un significativo incremento degli studi relativi alle politiche e agli ordinamenti universitari nell'Italia dell'Otto e del Novecento e alla storia dei singoli atenei in epoca contemporanea; un fenomeno, questo, che si colloca in netta controtendenza con il panorama delineatosi nei decenni precedenti, nel corso dei quali a dominare la scena in maniera quasi incontrastata erano state soprattutto le ricerche di carattere medievistico e modernistico. Nello specifico l'attenzione degli storici si era soffermata principalmente sull'aurea età delle origini, e dunque sugli studia medievali, con qualche significativa ma rara incursione nell'età moderna. A partire dai primi anni Novanta, invece, un notevole impulso alle indagini e al rinnovamento degli studi su questo versante è venuto dalla costituzione di specifici gruppi di ricerca e di centri specialistici dedicati prevalentemente all'analisi delle fonti e all'approfondimento della storia delle università e dei sistemi d'istruzione superiore nell'Italia e nell'Europa dell'Otto e Novecento sfociata poi nel 1996 nella creazione del Centro Interuniversitario per la Storia delle Università Italiane (CISUI), promosso da Gian Paolo Brizzi e dagli studiosi delle università di Bologna, Padova, Messina, Sassari e Torino. Oggi proprio il CISUI rappresenta la principale struttura di coordinamento fra i diversi istituti e centri di ricerca che operano nell'ambito della storia universitaria presso i diversi atenei italiani, nonché punto di riferimento fondamentale per la ricerca di settore in Italia e in Europa e aggregante studiosi e ricercatori di numerosi atenei della Penisola. Finalmente la storia dell'Università, oggetto di interesse anche per gli storici dell'educazione troppo a lungo "colpevolmente distanti" da tale ambito di studi, ha avviato così una riflessione storiografica puntuale, fatta di collegamento tra gli studiosi, di comuni percorsi di ricerca e soprattutto capace di spaziare in diversi ambiti disciplinari senza rimanere chiusa in piccole nicchie di settore.

Altrettanto prezioso è stato quindi l'intervento di Simonetta Polenghi e Anna Debè (Università Cattolica del Sacro Cuore di Milano), le quali hanno tracciato un *Bilancio sulla storia dell'educazione speciale in Italia*¹⁰ sottoline-

¹⁰ Sugli studi di storia dell'educazione speciale in Italia si vedano R. Sani (ed.), *L'educazione dei sordomuti nell'Italia dell'800. Istituzioni, metodi, proposte formative*, Torino, SEI, 2008, p. VII; A. Canevaro (ed.), *L'integrazione scolastica degli alunni con disabilità. Trent'anni di inclusione nella scuola italiana*, Trento, Erickson, 2010; A. Farinelli, *Alcune urgenze che interpellano la storia dell'educazione speciale. Cinque progetti di ricerca da sviluppare per colmare un vuoto storico-educativo*, «L'integrazione scolastica e sociale», vol. XV, n. 4, 2016, pp. 428-438; M. Schianchi, *Storia della disabilità. Dal castigo dei dèi alla crisi del welfare*, Roma, Carocci, 2018, pp. 11-18; S. Polenghi, *The History of Educational Inclusion of the Disabled in Italy*, in *Oxford Research Encyclopedia of Education*, giugno 2021, <<https://oxfordre.com/education/>

ando innanzitutto i diversi ostacoli per lo sviluppo della storia dell'educazione speciale, tra i quali i pregiudizi culturali, la mancanza di attenzione alla storia delle istituzioni e pratiche educative, l'isolamento della ricerca storico-pedagogica su tale versante nonché la pesante dispersione del patrimonio archivistico. Solo sul principio del nuovo secolo, grazie agli studi di alcuni storici dell'educazione, tra i quali Roberto Sani, Maria Cristina Morandini, Mario Gecchele e la stessa Simonetta Polenghi ha iniziato a svilupparsi un'analisi storiografica condotta in maniera puntuale e con gli strumenti adeguati che ha cercato di restituire la giusta dignità ad un settore della storia inopportunitamente trascurato, per mettere così in risalto le caratteristiche di fondo e i principali nodi che hanno caratterizzato l'educazione speciale nel corso dei secoli e, soprattutto, le intime e profonde connessioni con il più complessivo sviluppo dell'istruzione e della scuola, con le trasformazioni socio culturali che hanno contraddistinto la vita dei singoli Paesi.

Al *Bilancio sulla storia delle emozioni in Italia e Argentina*¹¹ sono state quindi dedicate la relazione di Francesca Borruso e Chiara Meta (Università di Roma Tre) per il versante italiano e di Myriam Southwell (Universidad Nacional de La Plata) per quello argentino. In entrambi i lavori è emerso l'interesse assolutamente recente da parte della storia dell'educazione per tale ambito di ricerca che, tuttavia, ha già espresso un notevole potenziale di sviluppo. Negli ultimi anni, infatti, come sostenuto dalle due studiose dell'ateneo romano, abbiamo assistito alla nascita di un nuovo ambito di studi relativo alla storia delle emozioni. Esso ha attuato una vera e propria rivoluzione nel modo di guardare alle fonti del passato, attraverso l'angolo visuale della sfera affettiva propria degli esseri umani nella storia. Sfida dunque aperta per gli storici sarà ora quella di far passare l'assunto che non sono i sentimenti ad avere un ruolo nella storia ma che essi hanno una storia a seconda dei contesti sociali e culturali nei quali si esprimono.

Utile per gli studiosi anche il *Bilancio sugli scambi e la diffusione delle*

display/10.1093/acrefore/9780190264093.001.0001/acrefore-9780190264093-e-1608> (ultimo accesso: 15.06.2024); L. Pomante, S. Montecchiani, *La storia dell'educazione speciale in area mediterranea come traiettoria di ricerca attraverso i risultati del progetto Connecting History of Education*, «History of Education & Children's Literature», vol. XIX, n. 1, 2024, pp. 177-192; A. Ascenzi, E. Girotti, *Apertura alla diversità e accoglienza della differenza: influssi transnazionali e cambiamenti propulsivi dalla/della letteratura per l'infanzia nel contesto italiano negli anni Sessanta/Settanta. Una proposta di ricerca*, «History of Education & Children's Literature», vol. XIX, n. 1, 2024, pp. 229-246.

¹¹ Sulla storia delle emozioni si vedano D. Boquet, P. Nagy, *Medioevo sensibile. Una storia delle emozioni (secoli II-XV)*, Roma, Carocci, 2018; C. Covato, *Pericoloso a dirsi. Emozioni, sentimenti, divieti e trasgressioni nella storia dell'educazione*, Milano, Unicopli, 2018; C. Meta, *Per un'etica del sentire: una nuova epistemologia per la storia dell'educazione a partire dalla storia dei sentimenti*, «Pedagogia più Didattica», vol. 5, n. 1, 2019, reperibile al seguente link <<https://rivistedigitali.erickson.it/pedagogia-piu-didattica/archivio/vol-5-n-1/>> (ultimo accesso: 12.02.2025).

idee pedagogiche tra Italia e Argentina proposto da Ignacio Frechtel (IICE – CONICET/Universidad de Buenos Aires), Micaela Pellegrini Malpiedi (ISHIR – CONICET/Universidad Nacional de Rosario), Juan Cruz Gimenez (Universidad Nacional del Litoral), Lucas Agustín Demattei (Pontificia Universidad Católica), Federico Jose Hirsch Veloso (Pontificia Universidad Católica) e Silvina Clara Franceschini (Universidad Nacional de Misiones/Universidad Nacional de Luján). Gli storici dell'educazione d'oltre oceano hanno presentato in maniera ricca e sorretti dall'analisi di un'ampia messe di fonti d'archivio e a stampa diverse proposte pedagogiche, più o meno limitate territorialmente e cronologicamente tra Otto e Novecento che hanno avuto come comune denominatore il collegamento tra Italia e Argentina: dalle esperienze pedagogiche della Scuola Serena all'importanza dell'educazione fisica nelle scuole argentine con le teorie pedagogiche ad essa connessa fino alle prime sperimentazioni educative della comunità italiana nella costituzione della mutua Unione e Benevolenza di Buenos Aires. Fondata nel 1858, ancor prima dell'Unità Nazionale, essa nacque come un'istituzione di mutuo soccorso. Alcuni italiani, resisi conto delle difficoltà di altri connazionali, decisero di unirsi per aiutare i meno fortunati offrendo assistenza economica e materiale agli italiani più bisognosi e indigenti. Inoltre, tra le mura dell'associazione nacquero tanti altri enti sociali, sportivi ed educativi italiani.

Ignacio G. Barbeito (IDACOR – Universidad Nacional de Córdoba) e Paula Alejandra Serrao (Università di Torino) hanno dunque chiuso il quadro delle relazioni con un intervento sul *Bilancio sui processi di scolarizzazione italiana in Argentina* che ha permesso di analizzare i processi di scolarizzazione verificatisi in terra argentina nel corso del Novecento, evidenziando parallelismi e differenze tra le esperienze registrate nelle due diverse nazioni.

A concludere le due giornate di lavoro e confronto è stato dunque Fabio Targhetta (Università degli Studi di Macerata, Italia) che nel suo intervento, *Circolazione, incontri ed eredità: teorie pedagogiche e istituzioni educative italiane in Argentina tra Otto e Novecento*, ha provato a riassumere il senso dell'iniziativa, sottolineando quanto il workshop sia servito, oltre che a far conoscere la situazione della ricerca storico-educativa in Italia e Argentina, anche a far trovare un linguaggio comune da cui bisogna far ripartire una reale internazionalizzazione degli studi di settore nonché un rapporto sempre più stretto tra le ricerche condotte nei due paesi. Solo da certi confronti è possibile costruire insieme, a più mani, una ricerca comune, una ricerca che abbia lo stesso oggetto o comunque il medesimo intento interpretativo, serio e rigoroso, che permetta di cogliere sempre meglio punti di contatto e di distanza tra due realtà territoriali molto distanti ma che storiograficamente hanno espresso numerosi elementi di vicinanza.

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