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# SISYPHUS 1

## EDUCATIONAL MODERNITY REPRESENTATION AND WRITINGS

*Edited by*  
ANTONIO VIÑAO & JUSTINO MAGALHÃES



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# SISYPHUS 1

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*Sisyphus — Journal of Education* aims to be a place for debate on political, social, economic, cultural, historical, curricular and organizational aspects of education. It pursues an extensive research agenda, embracing the opening of new conceptual positions and criteria according to present tendencies or challenges within the global educational arena.

The journal publishes papers displaying original researches—theoretical studies and empiric analysis—and expressing a wide variety of methods, in order to encourage the submission of both innovative and provocative work based on different orientations, including political ones. Consequently, it does not stand by any particular paradigm; on the contrary, it seeks to promote the possibility of multiple approaches. The editors will look for articles in a wide range of academic disciplines, searching for both clear and significant contributions to the understanding of educational processes. They will accept papers submitted by researchers, scholars, administrative employees, teachers, students, and well-informed observers of the educational field and correlative domains. Additionally, the journal will encourage and accept proposals embodying unconventional elements, such as photographic essays and artistic creations.

# Educational Modernity: Representation and Writings<sup>1</sup>

*Edited by Antonio Viñao & Justino Magalhães*

## MODERNITY AND SCHOOL MODERNITIES

Western historiography distinguishes an initial Modernity, which emerged in the medieval transition and lasted until the Enlightenment and the Revolutions in the second half of the eighteenth century. Between the transition of the eighteenth century and the post Second World War reconstitution, a second Modernity surfaced, associated with a political, economic, cultural, educational and aesthetic mainstream and globalisation of the school. For some, Post-Modernity began in the 60s of the twentieth century, however for others this period represented a different Modernity.

This broad timeframe is what shapes the history of education, particularly the school institution, as it is essentially at the root of the combination of studies in this issue of *Sisyphus*. Given that the construction of time is a central concern to the historiographical operation, it is often the object of controversy, although by rule, it tends to prevail over the event, leaning more towards the construction of a sequence of time frames, highlighting them, representing them in developmental frameworks, and drawing out their more profound and longer-lasting solidity. One of the main conceptual strands of the texts that compose this thematic issue is, in fact, the acknowledgement of a very lengthy educational period which takes distinct school modernities into consideration.

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## REPRESENTATION, EDUCATIONAL WRITINGS, MODERNITY

The set of texts published in this issue focus, to varying degrees, on the education-institution as a singularity, as an institution-school, or, in a narrower sense, as institutional schooling. From a more objective perspective, they focus on the school. Within the scope of the theme and its timeframe, the concept of representation provides a plurality of objects, figurations, meanings and forms of communication and appropriation. Representation encompasses both the uniform and the diverse, reordering the historical and pedagogical fabric, language, symbology, theoretical and conceptual framework, intentionality and the nature of the object. In other words, it changes authorship and the ways of symbolising and relating.

The materiality, ethnicity, field of ideas, processes and practices embedded in education and institutional schooling are embodied in materials and artefacts, particularly those incorporating marks of use, which are reconstituted and take on new meaning through ethno-historiographical effort. Beginning with and returning to this *instrumentalia*, Agustín Escolano develops an ethno-history of the school with an underlying reconstitution of the institutional, attributing a (new) meaning of school culture to Western modernity. An ethnographic history, including the ethnography of the school, refers to objects, icons and writings; to voices and oralities. Representation acts in the absence of reality; it takes on meaning through *mimesis*, analogy, interpretation, making it possible to create a narrative. It is a relationship of symbolisation and hermeneutics. There is no canon of modernity, as well argued by Agustín Escolano, however, there are communalities and patterns in the idea of the school, as may be observed in the images he presents. Representation reflects and affects the historical, cultural, social and symbolic framework.

Drawing attention to the polysemy of the concept of modernity, Antonio Viñao and María José Martínez Ruiz-Funes work on an extensive collection of illustrated postcards to show that the concept of modernity also reflects progress and innovation in the field of the symbolic and in the way of communicating. By briefly combining the image and caption, and reserving a space for a short dialogue between the transmitter and receiver, the illustrated postcard has become emblematic of a modernity characterised by progress, the assertiveness of communication and expansion. By preserving a joint, composite and identitary vision, secured by figuration and aesthetic quality, the postcard popularises and publicises, without compromising the selective or even the sublime, in the case of school sublimity. As Antonio Viñao and María José Martínez demonstrate in their broad historical and geographical analysis, the illustrated postcard has served the school in a completely unique manner. The illustrated postcard sheds light upon intentionality and





institutionality as it combines the figurative representation with the message, thus synchronising the timeframe of the institution, the time of transmission, the time of reception and, in the end, the educational horizon. Everything happens as if it were a single act of communication. The illustrated postcard combines figuration, spatiality and temporality, alluding to an educational imagery. It's a representation of education-institution.

Modern school has taken root in written vernacular acculturation. Schooling is unthinkable without reading and writing, their associated teachings, forms of learning, appropriation, use and methods. Through a highly long-term retrospective approach, reaching as far back as typographical mechanisation (which enabled the multiplication of printed matter and didactic means, in favour of a standardisation of the vernacular), when reading was deemed as the ability to deal with a unique text format, up to the 1970s, of being capable and knowing how to get the best out of any kind of text, Anne-Marie Chartier presents an evolution that associates literacy models with reading methods. In her text, Anne-Marie Chartier combines the history of reading with the history of the school. She presents a genealogy and an evolution of reading forms. Reading syllables and words and, in an intensive manner, reading textual situations and small texts characterised the beginning of the first historical phase which formed the basis of written acculturation and inspired reading pedagogy. This initial evolution yielded to the onset of extensive reading. From extensive reading, which was common from the second half of the eighteenth century, up to the generalisation of the principle that to read was to extract information from any kind of text, a common conception of the 1970s, a second evolution was born. Literacy, schooling and reading moved forward in union and became an integral part of schooling. Continuities and rifts may be established by examining the methods, means and aims, as is clear in the practice of extensive reading throughout the eighteenth century.

Arguing against a historiography that has referred to an educational void during the colonial period, Thais Fonseca offers a reconstitution of education in Portuguese America, particularly through the dissemination and circulation of the modern European school model. Educational modernity in Portuguese America corresponds to the circulation of models and manuals and also to a geography of *Cadeiras de Estudos Menores* [Minor Studies Subjects] and *Mestres de Primeiras Letras* [Primary School Teachers]. The demand frequently came from the local population itself, or from the local authorities. These requests reflect a representation of education and teaching as a form of civilisation, Christianisation, social and political order, the formation of elites and prosperity of the nation. Teaching was undertaken by the religious Congregations, but also by individuals and *mestres régios* [schoolmasters]. In the Minas region, the diocesan clergy also played a central role. With the Enlightenment and the standardisation of teaching, the right to education of

the local population was acknowledged. Information on written acculturation and schooling, referred to in terms of appropriation and symbolic representation, has progressively been studied and interpreted through accessible documentation such as testaments and codicils. These studies show that there was an intense demand, namely in the region of Minas, and an association between education and social order, inherent to the local and regional contexts.

The systematic and serial study on the aforementioned schoolmasters enabled Álvaro Antunes to obtain a representation of the specific features and secularising perspective that characterise education and school organisation in the region of Minas Gerais. This singularity is particularly evident in the period between the Pombaline Reform of 1759, which prohibited the Jesuits from teaching, and the proclamation of Independence (1822), namely the Additional Act of 1834, which transferred education to the municipalities. Álvaro Antunes concluded that this period was marked by the nationalisation of education, a feature that was intensified with the establishment of King John VI in Rio de Janeiro. Through characterisation and evaluation, supported by quantitative statistical data and the distribution of teachers, this study reveals that written acculturation and the implementation of the school institution varied from one region to another. It also shows that the body of schoolmasters or teachers, with specific characteristics and entrusted with the implementation of common practices, represented the uniformity and diversity of institutional schooling.

The geography of schooling highlights the fact that the institution accompanied the missional, written acculturation and colonisation. However, in the contemporary period, the times and meaning of territorial occupation had changed, making way for expansion and conflict, generated by the resistance and preservation of the cultures and identity of populations established outside their respective national territories. The study of Alberto Barausse on the Italian colony in Brazilian territory, in the period from the last quarter of the nineteenth century up to the period following the First World War, shows that schooling was used by the immigrants and the Italian government itself as an instrument of “Italianness”. The Italian government established a programme to support the Italian colonies in Brazil, namely by providing Italian manuals. On the other hand, with the advance of Italian fascism, an intensification of Brazilian nationalism, “Brazilianisation”, emerged on the part of the Brazilian authorities.

The representation of education is material, institutional, but above all symbolic. The school institution affirmed itself and evolved as another world. The language issues reflect the convenience of intrinsically symbolising and communicating these worlds; communicating from world to world; in other words, a world within and inside another world. It is here that the metaphor takes on an urgency and acquires a position in educational communication, as



revealed in the text by Alberto Filipe Araújo. The metaphor enables one to symbolise and tell the natural world within the school world, as it also assures that the school world acquires verisimilitude and meaning when symbolised and told in natural language. By using agricultural metaphors to symbolically represent the contents, gestures and ethics, and to reify the teacher-pupil relationship, resorting to the gardener and plant interaction, Célestin Freinet not only granted intelligibility to pedagogy, but also explored a supply instrument. A context of approximation and mobilisation was created and intentionality was fostered. An appeal to the agricultural universe, immemorial in human history, was also a rescue of the institutional component that characterises education and was important to transfer to the school.

The school institution consolidated elementary schooling, however it was in secondary education that schooling became converted into comprehensive education, representative of the future. Higher Education was also progressively assimilated by institutional schooling and benefited from educational modernity. It was in the context of University Education that the dialectic among internationalisation, nationalism, scientific and cultural progress, essential to political diplomacy and economic and technical development, became indispensable to the formation of contemporary elites and was transformed in representation of institutional schooling. Antonia María Luna briefly presents the historical confluence in Paris of the foundation of the League of Nations with the construction of *la Cité Universitaire de Paris*, immediately involving dozens of nations. The implementation of the *Colegio de España* [Spanish School] occurred at this same conjuncture and was built as a representation of the Spanish identity abroad. Bearing architectural configurations, habitats and nationalistic symbologies, the *Cité Universitaire de Paris*, whose project was idealised and constructed at the time of the emergence of the League of Nations, and prevailed, even after the failure of the latter, represented the implantation of another world for worldwide elites, and did justice to the utopia of Mercier in *L'An 2440*.

From culture and canon to boarding school, from the small school and intensive course to a comprehensive and continued curriculum (encompassing primary school, secondary education and, finally, higher education) the institution-education configured the institution-school and took institutional schooling as its content, means, process, weighting factor and future in the school-society relationship. The lengthy educational modernity consisted of school modernisations. The institution and the writing of education underwent changes, expansion and adjustments. Indeed, it is my aim to address this complexity and history in the last of this set of texts. History eventually and finally emerges to bring intelligibility and consistency; to prolong time up to the limit of what is historically manageable; to bring historicity and educability closer together. The school institution may have shaped the education-institution, but it was institutional schooling that forced the school to evolve.



Educational writing, which is essentially pedagogical, incorporated imagery and fantasy, but it also adapted to the statistical, metric and didactic.

## HISTORY OF EDUCATION AND INSTITUTIONAL SCHOOL WRITINGS

The studies published herein, which focus on the representation and writings of Educational Modernity, have recreated the historical operation, making it open to interdisciplinarity, flexibilising perspectives, intersecting sources, noting and interpreting different representations, establishing a meaning, constructing time, and writing a dense, representative and meaningful narrative. New perspectives on educational and school modernity have emerged from such labour, guided by a historiographic epistemology. A reconstitution of institutional schooling has been obtained, represented by different symbologies: working in distinct times and geographies; reflected in material, iconographic and written configurations; interpreted and narrated in a diversity of ways. In this joint cartography and narrative confluence, convergences and communalities may be observed, however each study contains its own theme, an authorship and in its own unique way has constituted an innovative study.

I truly believe that the Journal *Sisyphus* has been enriched by this edition of studies. I would like to extend my sincere gratitude to the *Sisyphus* Committee for having entrusted me with this challenge. However, I wish to show my particular appreciation of the authors who, despite their prestigious standing and constant invitations to join other challenges, gave priority to my request, converging through a structured perspective, and to whom I am extremely grateful.

Nevertheless, this certainly would not have been the case if Professor Antonio Viñao had not accepted the role as external editor, and whose collaboration is reflected in his supervision and advice, all performed with the mastery and rare knowledge that set him apart. To him I wish to express my sincere gratitude.

*Justino Magalhães*

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**ETHNOHISTORY OF THE SCHOOL.  
REPRESENTATIONS OF MODERNITY**

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**ABSTRACT**

This study analyses and discusses the historiographic construct “modernity” and the problem of its representations and their readings and interpretations. It examines the question based on two exemplifications, with the aid of iconographic sources, attributing to them the function of mimesis of the empirical culture of the school: a) the universal exhibitions (modernity as performance); b) the ambivalences of the modern (dialectical understanding of modernity). It concludes with an attempt at a synthetic closure of a hermeneutic character.

**KEY WORDS**

Modernity; Ethnohistory; Hermeneutics; Universal exhibitions;  
Dialectics tradition/Innovation; Iconography.



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# Ethnohistory of the School. Representations of Modernity<sup>1</sup>

Agustín Escolano Benito

## OF WHICH MODERNITY ARE WE SPEAKING?

In this study we will not talk of modernity in a purist historiographic sense, that is to say, in reference to the modern era to which history scholars refer, who limit this long period between the Renaissance and the Enlightenment. We refer, rather, to a historiographic construct of modernity which is more flexible, less canonical and more pluritopic. This means accepting the proposition that modernisation can be seen in shorter time processes and under less fixed reference models as well as in more diversified contexts.

Peter Burke himself, who dedicated his first work to studies on the origins of modernity at the end of the fifteenth century, has had to clarify that today it is necessary to recognise the existence of at least three historical modernities: the original or Renaissance one he studied; the one which commenced in the West with the political revolutions and the industrial revolution at the end of the eighteenth century; and that which started with the newest technoscientific revolution of today. One modernity would thus be overcome and relieved by another and this again by one which is more advanced (Cieszynska, 2014, 13 ff). Even more, if we enter the possible consideration of the continuous succession of contemporary vanguards as a historical incarnation of modernisms, the epiphany of the modern would be still more dynamic and full of change.

In the long time period perspective—the braudelian—which is that suggested by this monograph of *Sisyphus*, the history of education may be examined as a continuity/discontinuity which took off in the origins of renaissance modernity, in connection with the birth of Nation-States, and in parallel to the strategies of religious influence after the Reformation. This historical process would go on expanding, albeit with different rhythms throughout a multiseular period until the present day. Thus the educational institution should see itself as a product derived from modernity itself and, at the same time, as a variable influencing the processes of modernisation of those societies in which compulsory education has been or is being implanted.

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In a closer and more precise way, and better adapted to the guidelines of this publication, the modernity which concerns us here would be closer to that proposed by Justino Magalhães—one of the co-ordinators of this monograph—in his recent historiographic study of the question. It would, in this case, cover the frame of the last two centuries from the Enlightenment, which inaugurated a long period as well in which the cultural synthesiser of, in the author's terms, the “school education” would be formed. Throughout this time cycle, institutional education was affected by social implantation, through its pragmatic mediation, of the written culture and literacy in order to create the literary citizen. This was the nuclear option adopted by educational modernity as the leitmotiv of its legitimisation. In the school, the Nation-State found a way to implant and universalise its civilising pragmatics, and to transcend the limits of the pre-modern vernacular cultures, still chained to the oral world. Liberal rationality legitimated its authority elsewhere by tracing a remarkable isomorphism between school life and social life. In this way, the school instituted an anthropology and a new subjectivity by means of the dissemination in the enlightened population of practices and knowledge which were replicas of the social matrix: written culture, lettered mind, literate citizen, school discipline (Magalhães, 2010, 417 ff).

At another level, contemporary hermeneutics, which Antonio Valleriani—favoured disciple of Paul Ricoeur—defines as pluritopical, has underlined that as single canon of modernity cannot be assumed, as early hermeneutics sustained, while each of the cultures discovered and analysed by anthropology sustains its own horizon of what is modern as a higher value (Valleriani, 2003). The fragmentation of practices and discourses which have accompanied postmodernity in recent decades (Escolano, 1996, 325 ff) has, without doubt, reinforced this pluralist view of modernity, at the same time as postulating as a new value of innovation, by adding to that postulated by the different identities, the themes of alterity and diversity originated by the crossing of cultures.

Consequently, we should assume a more flexible view of modernity than that as defined by conventional historiography until now, and as far as the modernisation of the school is concerned, we should prioritise the analyses which contribute to understanding the continuities and the changes which institutional culture has attempted to carry out empirically and pragmatically the processes followed by diverse identifiable civilising modernities historically when trying to implant the paradigm of “school education”.

## THE ETHNOHISTORICAL CHANGE IN EDUCATION

In the above context, we propose to show in this work the verification of some processes of modernisation which have been occurring in past societies from an ethnohistorical perspective, that is to say, from a certain strategy which, by prioritising phenomenology, allows us to recover experience as a value and as a source of knowledge, exemplifying some of the changes observable in the material and empirical testimonies in which educational modernity has been registered.

The history of traditional education was largely legitimated under so-called humanist orientations, owing much to classical and contemporary idealisms, which set out to see the evolution of the school as an expression in time of the generators of the original modernity, from the Renaissance to the Enlightenment. At the same time, that history reflected—within our western framework—the impact of bourgeois mentality which modelled the revolutionary era throughout the last two centuries, as well as of the popular social movements which were produced as reactions to the dynamics of capitalism, highlighting the relationships of education with the development of the idea of progress and with the affirmation of the value of citizenship in enlightened democracies.

The two classical historiographical concepts—the idealist and the positivist—have been questioned from the perspective of a new pragmatism which criticises the ideological and superstructural character of the epistemes it is based on, and have affirmed, a *sensu contrario*, the primordial value which has to be attributed to the empirical culture of the school and which may be examined from the directive practices it is materialised from. For the new critics, the history of education is not what it was for the idealists and the positivists. This was perhaps what would correspond to its ideals and desires, whether achieved or not, but not to effective history, that which takes place in the real world. The new orientation leads us to base educational historiography, in a pragmatic approach, on the study of the significant and discursive practices, or meaningful actions, which allows us to unveil the codes of what some authors have termed “grammar of scholarisation” (Tyack & Cuban, 2000, 167 ff), in whose codes we might find the most achieved pedagogical tradition—also, therefore, that which is ascribed to modernity—and the *habitus* which has modelled the professionalism of the teachers.

This is precisely the historiographic change which has led to ethnohistory and its corollary, hermeneutics, that is, the writing, reading and interpretation of the experiential elements provided by any ethnology. The world of practice is an essential register of what the school was in reality and of the knowledge we have constructed around it. In the *empeiria* of





institutional life, actions, discourses and the governing norms of education materialise in the factual plane. Experience is, at the same time, the field in which the frameworks of modernity or conservatism displayed by educational institutions is exhibited in an observable manner.

History, like all social sciences, has thus followed the sensible proposal of Pierre Bourdieu, who advised attending firstly to the healthy “practical reasons” in which a culture is to be seen (Bourdieu, 2007, pp. 9-10). It has also responded to the indagations of the sociologist Richard Sennett, with its obstinate search for the *techné* underlying any form of practical wisdom, and definitively all activity of intelligent culture (Sennett, 2009, pp. 20-22). The phenomenological immersion, on which the new historiography is based, centres its research attention on the action that memory and ethnohistory reconstruct in the form of factual representations which aspire to configure themselves as a mimesis of the empirical reality analysed. This mimesis would be definitively constituted in the most realistic and plausible image of “culture of practice” referred to by Zigmunt Bauman (Bauman, 2002).

Teachers forged their profession with the good practices they tried out in the everyday life of the school. The exploration of these actions, which are not good or modern because they were thought of or standardised as desirable, but because they were effective in the everyday management of the institutions, and because they took root over the course of time, is the aim of ethnohistory. Such actions were, as far as our analysis is concerned, fully modern. Even in the origins of modernity there were “ignorant masters” who invented certain modalities of *techné* which were effective, even though they seemed rudimentary, and which circulated in different means, giving birth to different forms of professional appropriation in diverse contexts (Pereyra, 1988, 193 ff). This is not a *boutade* in the style of the Jacques Rancière’s illiterate master (Rancière, 2002, 31 ff), but a form of value justification which all good empiricism may have.

The above references did not interest traditional academic historiography. They are, however, fundamental content for the construction of the new pragmatic history, that which sets out to look for the keys of the historical persistence of certain patterns which remain codified in what Marc Depaepe and Frank Simon have called the “black box” of school culture (Depaepe & Simon, 1995, p. 10). These elements are precisely what modernities have to tackle in order to introduce changes in the teaching customs and uses established by the institutions. Understanding and explaining such traditions is absolutely necessary in order to interpret the changes fostered by modernity.

All historical ethnography—including school ethnography—concludes with the constructions of a text made up of the diverse materials gathered in the researchers’ notebook: a) the objects: archaeological exponents of the material culture; b) the icons: images which illustrate diverse aspects of the

reality analysed; c) the writings: text products created by the actors in their past experience, and d) the voices: oral or narrative registers transcribing subjects talking to us about the past. The final product of ethnography is a formalised written text, or in other terms, a material, verbal-iconic and testimonial representation which becomes a type of *mise en scène* of the collected elements and actions, or a performance which becomes a plausible mimesis of the reality the researcher may offer of the practices examined.

As an *interpretandum* to writing, understanding and explaining, ethnography is made up of the three structural historiographic operations Michel de Certeau spoke of: the archivistic or documentary, the comprehensive-explanatory and the “writteness”. This last one is precisely what is offered to the readers as a representative construction of the past, or as the final expository synthesis of what has been studied. Regarding this proposal or *hermeneuein*, the interpretive community may pose questions and make plural readings, all of which will work as a dialogue in order to approach a possible and, perhaps, desirable intersubjective version of the text, which is really a representative language of an absent reality—what happened previously but no longer is, what memorialistic practice reconstructs and to whose image is attributed the statute of mimesis susceptible to interpretation (Certeau, 1975, chapter 3).

## WHICH REPRESENTATIONS?

How has what is modern been represented in the images offered by historical ethnographies of education?

Are these representations a true mimesis of the reality studied, that is, the analogical proof of identity of the modern or innovating school? Or are they, perhaps, formal constructions, not lacking a certain artificiality, which searches above all for efficacy in the symbolic legitimisation of the role played by the institutions, the social agents and the bureaucracies in the promotion of modernity as a value giving credit to the ideology of their desires and powers? Let us see.

The analysts who approach the study of reality through its representations always need to allude to the implicit limits of the model used, a question already raised in classical dialectics. For the earlier ones, the representation was not the same as the thing represented, but rather, as Jack Goody points out, a certain reconstruction, the image made up of the shadows of the things projected in a cavern. However, the words themselves mean somewhat more than a representative imitation of the things they allude to. This has precisely the value of what Paul Ricoeur calls “living



metaphor”, a rhetorical figure which opens the semantic field of the verbal, and also the iconic and dramatic (the action), to the plurality of readings and meanings (Ricoeur, 2001). The English anthropologist also chooses to consider mimesis, according to the above, as a form of re-presentation or re-creation open to the diversity of readings or interpretations (Goody, 1999, p. 23). What is more, this flexibility sits well with the open, pluralist meaning we have agreed to confer on modernity.

To prevent us from falling into the possible fallacies that might lead to an acritical use of the reality/representation/mimesis trident, I should like to comment on an observation that Paul Ricoeur makes when glossing Michel de Certeau’s methodological proposal regarding the formalisation of the archive—the first historiographic operation in the establishment of historical sources—in the context of research into the past, as far as this past is necessarily a reality which is already missing from the phenomenological sight of the analyst who is attempting to reconstruct it (Ricoeur, 2003, p. 267).

All representation presupposes an absent reality and aspires to be a faithful imitation of what Michel de Certeau calls *l’absent de l’histoire*. In this action, documents are segregated from practice and from the subjects which created them (Certeau, 1975, 64 ff), at the same time as going to occupy a ‘place’ in the new intellectual space which is generated in the representation. In the case of those representations which make up ethnohistory, the new setting materialises in the researcher’s field notebook where the documents found on the searches are written up. This includes the iconic, oral and material ones, not just the literary ones. The field notebook, being a syncretic text, offers more likelihood of approximating the mimesis to the represented reality.

At times, the mimesis has competed with other types of alternative proposal to classical historiography. Fiction and narratives based on memory aspire, according to Roger Chartier, to be an alternative to history itself, insofar as these constructions sustain that they are probably no less legitimate than conventional histories, which are always exclusively attributed the values of truth and scientific worth, without ever demonstrating this sufficiently, at least to the satisfaction of all (Chartier, 2007, p. 34). Furthermore, the products of memory and narrativity, be it imaginary or fictional, offer more motivating and didactic tales, according to the reception and appropriation of their messages by the subjects and collectives of people who make use of them, and to whom the subjective or intersubjective interpretation is finally transferred.

Be that as it may, to the practical effects which interest us here, we have to agree that, as the semiologist Roland Barthes indicated, all image is a certificate of the existence of what is represented, which initially provides efficient proof of a certain reality. It is not, therefore, a more metaphorical register (Barthes, 1986, p. 95). Another thing all together is the interpretation we may make of it regarding the real world preserved by the memory

condensers which are all the sources which speak to us of the past, and which, in the present study, refer to the processes of change and modernisation which have affected the history of the school.

The representations are configured otherwise, as Jack Goody underlined, as norms inherent to all human expression, necessary in any process of communication. They occupy a central symbolic and imaginary space in social and cultural identity and, furthermore, constitute an observable measure to elucidate the implicit anthropology they carry (Goody, 1999, p. 12). When trying to reconstruct what was in the past the reality being studied, the ethnohistory of education, as well as the material and visual archaeology works with objects and representations of what Martin Lawn called “abandoned modernities” (Lawn, 2012), that is to say, with physical materialities which were once signs of change and which later, on being substituted with other, more innovating ones, fell into decay. The so-called modern times have behaved, on an aesthetic and technological level above all (although also in social uses as well), like a succession of vanguards, that is, like a continuous substitution of modernities for others. These modernities have been objectified in the representations originated by the archaeological remains which have been preserved.

We have to confess, despite the above, that education has not been so dynamic, as far as the processes of renovation are concerned, as other technical and social sectors of life and culture, although in certain periods, such as in the cycle of movement of the New School, the so-called escholanovism, it has been inspired by the dynamic inherent to the periods of change in other fields. If other historical cross sections of the educational modernising process are examined, the successive synchronic texts to be analysed would surely offer the image of a palimpsest, on which we would discover diverse writings belonging to different evolutionary moments. This ethnographical model would elucidate layers of emerging and dominant scripts, together with others of decadent and even obsolete pedagogical models. The archaeological material of teaching allows us to exhume these abandoned modernities, which in their time were unequivocal signs of innovation. This exploration facilitates the discovery of some keys to historical logic which help us to explain the persistencies and substitutions in the process of change, which defines the critical task of the new cultural history of education, frequently based on material sources or on their representations.

The ethnologist historian finds objects, images and writings for the pedagogical world, be it *in situ*—sometimes in forgotten corners of the institutions themselves, or in museums and archives, in private collections, in antique shops, and even in rubbish containers for the school material which is no longer used. With these materialities, the researcher often makes syncretic assemblies which pretend to be more or less truthful with regard



to the reality which the remains belonged to when they were in use. By means of a certain do-it-yourself operation, the ethnographologist produces representations in series, as a puzzle or in a mosaic which, at least in hypothesis, are, it is supposed, a mirror in playback of what might have been the reality explored. If this exercise is directed to showing the changes brought about by modernisation, the historian may contrast the new image with earlier scenographs, which will be seen as archaic.

It should be warned that many conserved images of the school past were produced by the same educational institutions which were the subject of representation or by the agents who tutored the system. They implicitly bear the intention of the image creator to offer the public the innovations which showed unequivocally positive signs of advance towards the desired modernity. In other words, they were proof of goodness on the path of progress. On other occasions the scenes could denounce certain critical aspects of the reality represented. Some of these scenographies can even be included in the pictorialist current, a method of setting up scenes like pictorial performances constructed with a certain theatricality or photographic mannerism. The iconographs may finally respond to memory rituals, incorporating in the *mise en scène* certain fetishist gestures which distance the representations produced from the desirable spontaneity which would allow us to contrast the truth of the modernity offered by the images (Escolano, 2015, 45 ff).

A considerable portion of the previous *mises en scène* were designed to corroborate and reinforce the myth that universal education was a *pharmakon* for all the evils of civilisation and an unequivocal achievement of the established discourse regarding the progress of society and man, the *leitmotiv* inherent in the very idea of modernity. *Happy and in school [Felices y escolarizados]* was the title of a suggestive and controversial monograph by the Spanish historian, Raimundo Cuesta, and whose central argument centred on the criticism of the binomial school-happiness which has attempted to legitimise the development of educational systems in the contemporary period as a process towards the welfare of individuals and the community, a discourse which the author considers to be partly an ideological fallacy of modernism and of the dominant discourse in the period of the liberal revolutions which would even affect a certain conception of childhood and adolescence as entities who were to be mainly tutored as minors by the “intelligentsia” of the knowledge-power system (Cuesta, 2005, 187 ff).

## TWO EXAMPLES

From the above considerations which make up, even with the limits we have noted, the new norms of school ethnohistory, we shall analyse two subthemes which will allow us to exemplify, mainly by means of iconographs, the possible modes of representation and symbolical legitimisation of what we may understand as educational modernity. These exemplifications set out to offer a visual sample of how school ethnohistory can investigate and explain the processes of change and the signs of continuity circulating in the past so as to illustrate the links to modernisation in the field of educational practice. All of this is placed in the context of educational institution pragmatics, which is not the same as would correspond to other fields of school culture, such as the academic or political ones.

One of these examples affects the universal exhibitions which took place in the second half of the nineteenth and the beginning of the twentieth centuries, a topic we have already seen in another historiographic study (Escolano, 2009). The representations we can follow concerning this field are, in general, of a performance nature, insofar as they attempted to publicise or exhibit, in terms of political and economic or technological marketing, the objects, images and texts in which contemporary modernity was expressed. In these great theatres of humanity, which is what the exhibitions were, the images they announced and diffused can be seen as performances, that is to say, as exhibitions which propagated the achievements that the national societies, the companies of social and professional corporations showed in order to confirm their progress and positive advances on the world stage.

A second example shows the double-headed and dialectical character that modernity has had since its origins, attempting to offer a more complex and dynamic image of the innovation processes than a simple performance. This example, alternative and complementary to the previous one, does not just underline the positive aspects of the innovator insofar as the dialectical relations which are always present in the interactive play of the modern with the old, which is introduced in a certain historical moment as a novelty with respect to established tradition, that is to say of the past which is presented as a practice in decline.

The relationships between tradition and modernity may be illustrated by means of *ad hoc* iconographies of the everyday world and of the world of the school in diverse periods and in distinct thematic sectors which make up the field of education as an empirically representable and visualisable fact. Some scenographies which have circulated as convincing evidence of certain known historical facts show signs that reveal changes in the real situation they represent, and these visible transformations are the expression of how the processes of change towards modernity have been shown publicly.



Audiovisual anthropology, a new current in cultural studies, which is based on the intelligent use of the image, offers new paths in the detection, explanation and interpretation of the underlying practices and discourses of the language of the visible, or, if it is preferred, in the rhetoric of the image about which Roland Barthes (García Vera & Velasco, 2011) spoke some time ago. The anthropology of our period, as has already been said, often falls back on history to explain the genealogy of cultures, and historiography has also been anthropologised to some extent in order to adopt a more cultural perspective of time and of societies, not only in its methods but also in the discourses which affect the hermeneutic understanding and explanation of the ways of civilization, that is to say, its own episteme.

#### MODERNITY AS PERFORMANCE: THE UNIVERSAL EXHIBITIONS

The universal exhibitions were the expression of the level of modernity of a period. They established images, discourses and practices which were offered worldwide as vanguards of the time and as new horizons in the advance to the future. Their proposals originated new representations of civilisations, peoples, cultures, and also of education. At the same time, these great international exhibitions gave visibility to many people who, until then, had no history. It introduced them via this public space into the great theatre of humanity, that is to say, into the new modernity.

António Nóvoa has underlined how these world exhibitions formed, at that time, new public spaces which gave social visibility to the advances offered by national educational systems in their period of birth and implantation, and how they influenced the educators and the politicians, along with the invention and development of the so-called “school model” which circulated and was imposed as a normalising device in various cultural sectors and which originated the mass institutional education (Nóvoa, 2006).

Performance, publicity and marketing are constructs which are associated thanks to their complementary semantic similarities. An exhibition is held to publicise a message as a commercial attraction. Products were sold in these exhibitions, prestige was at stake and national identities were affirmed. The universal exhibitions showed how signs of modernity, in the framework of the creations of industrial society, the most outstanding educational innovations of the different countries, and, among these, the materials which made up the incipient technology of the schools in the so-called era of progress. Such performances were also offered according to the logic of the market and of the industrial revolution.

At another level, the exhibitions, as Moisés Kuhlmann underlined, were “great didactic parties” which could be defined, using the language of



metaphor, as a “temple” in which the liturgical admiration of the visitors was offered certain market techniques created to support the feeling of “secular faith” in the progress of industry and civilisation (Kuhlmann, 2001, 24 ff). Walter Benjamin considered them as places of pilgrimage for the different types of public, on whose stages the objects could even reach the category of fetish (Benjamin, 1972). Other authors have defined them as “display cabinets of progress” in the “concert of nations”, a kind of shop window or space open to competition regulated and credited by prizes and distinctions (Neves, 1986). Some have even qualified them, looking back to Denis Diderot and his project of compendium of a universal taxonomy of knowledge, as “a living and illustrated encyclopaedia of civilisation” (Silverman, 1977, p. 78). It is clear, therefore, that these international shows were an enormous window open to the world—a nomadic exhibition travelling from city to city—which offered *urbi et orbi* the modern representation of the world, and, in our field, of the school.

Many of the images and the contents of the fairs entered the school by means of the posters, iconographs, manuals, literature, press and other kinds of publicity, thus forming a universal message of the level achieved by civilisation, a discourse which was necessary to spread not only as intellectual content but also as an expression of the ethos inherent to all cultures, considered both individually and globally. Some of this information was even transferred to the first pedagogical and ethnographical museums, codifying iconic stereotypes of the national, anthropological, social and aesthetic heritage of the people, the nations and the empires. This repertory of texts, images and material realities established a social and professional image set, that is, a culture.

A whole future is initiated, therefore, in the scenographies of the new modernity. *Modelling the Future* is the title that Martin Lawn gives to the publication of the collective work on the subject in Symposium Books, a collection of the studies presented in the colloquium which took place in the International Centre of School Culture (CEINCE) in 2007 (Lawn, 2009), with the participation of historians from cities where one of the first exhibitions took place (London, Paris, Chicago, Buenos Aires, Tokyo...) of the second half of the nineteenth and the first decades of the twentieth centuries. By examining the educational materials that these international exhibitions showed as “modernities” we can discover the elements of the future announced and initiated in them.

The materialities and representations shown in the universal exhibitions thus offer new registers for cultural and educational history from an ethnographic and hermeneutic perspective, which is to say for a research orientation which emphasises the examination of archaeological remains and their interpretation by means of the reading of the index signs that the objects and icons exhibit when seen as representative texts which are





synthesisers of modernity. Hence the exhibitions constitute a field of study of a high testimonial value for historians of the empirical culture of the school.

These shows opened spaces to receive and exhibit the inventions which were the tools of the early modes of school production, developed alongside the educational systems. They were the meeting place for the first editors of school manuals, the inventors of mechanical devices of the incipient teaching technology, the representatives of state bureaucracies interested in showing their own achievements and seeing the advances of others, the associations behind the fomenting of popular culture, among others. Thus, in these periodical meetings, social and professional audiences were created and a public image was configured which was identifiable and recognisable by all for the school as institution open to the modern world and to civilising progress within the heart of the new industrial society.



*Figure 1.1.* School in Tolosa, Spain (1856) and *Figure 1.2.* Commercial fair in Aveiro, Portugal (2007). Two images originating from the exhibitions. The first one corresponds to the presentation made by a school in Tolosa, Guipúzcoa, Spain, of a new method of teaching reading from the Universal Exhibition of Paris, 1856. The second is an image from a show or commercial fair held in Aveiro, Portugal, in 2007. One and a half centuries separate one from the other. The technology has changed: from the traditional tables with benches, blackboard, moveable letters, boards—to the digital devices. The geometry and placing of the elements in the classrooms as well as where the participants are placed, are still familiar in their morphology. In the first one, the teacher, of a priestly attitude, teaches from the plinth or raised platform under the sign of the cross. The second one is much more functional and mobile as well as being secular.

One and another source, those who invented and created the image set of the unknown sceneries and the sociocultural stereotypes of the people who visited the exhibitions, as well as those who spread the first modern materialities of teaching, constitute today a new archive in which we may explore the educational practices and the ethnographical elements which

allow us to approach the construction of the material heritage of the school and a certain archaeology of education, empirically based and at a microhistorical level.

The universal exhibitions were the first show case—a kind of *orbis pictus*—in which the previously noted twin dimension of the world of education was shown in public: firstly, with reference to the school codification of the image shown through the texts and other didactic mediations of the natural, social and technical reality of the peoples of the world as a curricular content of instruction: secondly, as far as the internal culture of the school itself is concerned, insofar as those stages of modern civilisation could exhibit and communicate to all members of the public the first objects, icons and texts of the incipient education industry and of the new ergological tools belonging to the profession of teacher.

Throughout the historical cycle we are analysing, the fairs of contemporary modernity constituted ritual meetings to which the civilised countries felt themselves called to give account of and to learn the new advances being achieved in the spiral of modernity. They were a spectacle, a scene for pedagogical commerce, a space for the meeting and comparative evaluation of nations and a kind of Olympic theatre in which cultural identities and diversities could be shown. At the same time, there was competition on a global scale regarding the economic and technical achievements of each country.

Many realities from all over the world could be seen for the first time and this proto-representation would structure the observations, the cultural and pedagogical stereotypes which would be transferred to cartography and books. At the same time that these images would become one of the first data banks they would also constitute the first cognitive clichés about the contemporary world.

In this environment were also born the first prejudices that influenced the relation game of perceptive themes on which the interaction between the nationalisms and imperialisms of the end of the nineteenth and the beginning of the twentieth centuries was based. All this occurred in parallel to the invention by the State of the school as public space, in such a way that the exhibitions were to create a certain fusion or interaction in the management of a convergent discursive formation, of a long and wide-spreading influence, about the things and the words which affected the political and social legitimisation of education in the contemporary world.



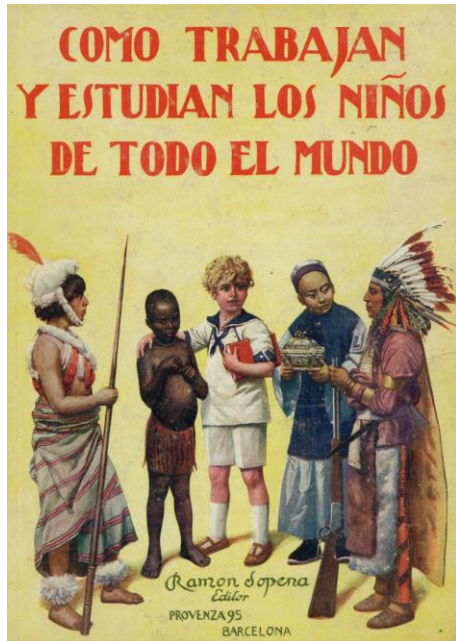


Figure 2. Ramón Sopena Book. The school manuals were exhibited on stands at the exhibitions. Some showed the prizes they had received, crediting their modernity. Others reflected their internationalism, also a modernist feature. See the cover of a Spanish school manual from the beginning of the twentieth century, edited by the publisher Ramón Sopena of Barcelona. The *mise en page* clearly shows an ethnocentric discourse. The white boy is in the centre of the illustration and responds to the European modernist model. With a book in his hand, he is the stereotype of the evolved, enlightened child, protector of the children of other ethnic groups, which

emerge from the abysses of barbarian or exotic life. Images such as these are also an expression of the imperialist discourse of the hegemonic countries.

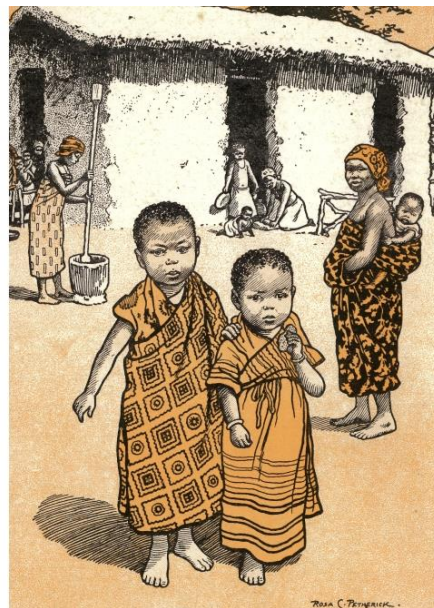
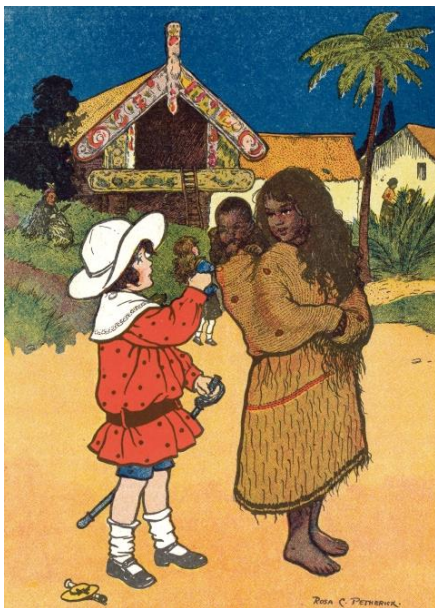
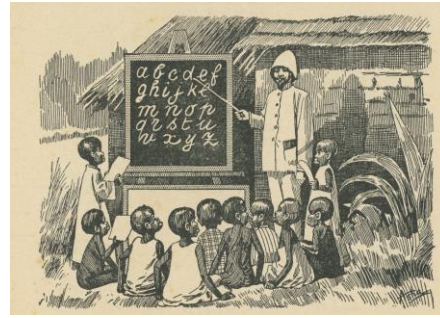
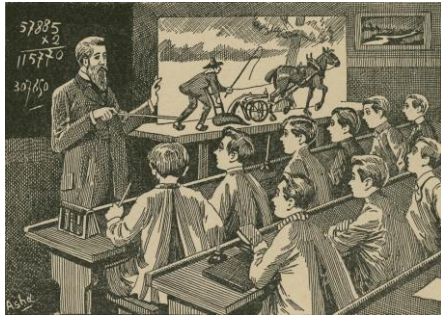


Figure 3. Children of New Zealand and Africa (1917). In the years of the first exhibitions, the determinist sociology of Taine and Wundt's *Volkerpsychologie* fostered the study of the natural features of peoples, based on differential ethnic and cultural substrates. The representations exhibited in the Universal Exhibitions and those later collected in the school manuals contributed to creating and spreading national and continental stereotypes, including those relative to the infancy of peoples who had not yet had access to modernity as is shown by the icons we have taken from this text of 1917.

The emerging technologies of the new school became a symbol of the level of modernity—a performance—that the education systems were achieving in their respective countries, and even an indication of the comparative degree of their progress. From another point of view, such materialities opened the school world to the processes of technification which were occurring in other fields of life, and even generated interaction among the administrators, the creators of the media and the producing companies.



Figures 4.1. Danish School and Figure 4.2. School of Senegal. School books from the end of the nineteenth and beginning of the twentieth centuries also transmitted images of the schools in different countries, sometimes of very different cultures. See, for example, these scenographies of a Danish school, with modern means and methods, and another from Senegal, representative of a very archaic, pre-modern colonial pattern.

The exhibitions were, at the same time, in the period of the liberal-bourgeois revolutions which fostered competitiveness and postulated the idea of progress as the dominating discourse, spaces for the comparison of nations, a kind of international kaleidoscope in which the countries observed each other, learning one from the other (Guereña, 2007, p. 33). The prizes won in them were used as publicity as well as self-esteem and evaluation of the others (Plum, 1977). The Palace of Industry, with the Street of Nations, of the Paris Exhibition of 1867, of vanguard architecture, had been conceived as a giant cosmopolitan shop window with circular galleries and radial streets, where the situation of each country was, in itself, an evident sign of its place in the ranking of nations.

Spain, it would seem, had not known how to show an image of modernity fitting of the time. Despite its 2.648 exhibitors and participation in all sectors, the balance of our presence in the 1867 Exhibition offered an image which was too stuck in tradition, according to the observer Orellana, beginning with its lordly architecture, serious and severe, and not at all in agreement with the industrial styles of the new technology (Orellana, 1867, p. 128). The exoticism of the Spanish pavilion was still inspired by the world of bullfighting and



other topics relative to our traditional life, as well as by other historical nostalgia, dreams which, for the visitor, were already in obvious decline. The writer Benito Pérez Galdós, who attended the exhibition to “study and enjoy himself”, realised this Spanish inability to seduce others in the labyrinth of Paris, and felt himself called to set out the urgent need to rethink Spain, a prelude to the upheaval of the regenerationist intellectuals of 1898 (Guereña, 1989).

The comparison of nations originated complaints which reached almost diplomatic levels, such as that which sprang from a map published by mister Manier, corresponding to the Paris Exhibition of 1867, which reflected the progress of countries in the field of public instruction, and which represented Spain, with notorious injustice according the response offered by Asciclo F. Vallín in the booklet presented in the 1878 Exhibition (Vallín, 1878), in a position which did not correspond, accompanying countries which were far more backward than ours such as Russia and Turkey. Vallín’s rectification, published in Spanish, French and English, for general diffusion, was based on the latest statistical data and set out to restore national honour by situating Spain in the second block of countries, together with Belgium, Norway, Holland and England—a more respectable position—behind Switzerland, Germany, Sweden, Denmark and France, but ahead of others such as Austria, Italy, Portugal, Greece, Russian and Turkey. This defence of national honour, an insult for its apologists and defenders, even reached the French press, where articles were published illustrating the new data in an attempt to restore Spain’s image in public opinion.

The universal exhibitions began, therefore, to play their role as *ad hoc* stages to facilitate competitiveness, in a period which historians consider proto-statistical, in which what began as practice would later become a discipline of the field of pedagogical science: Comparative Education. Asciclo F. Vallín even proposed in his presentation the celebration of an International Congress on Popular Education in which, by means of a unified or standardised form, the data would be collected to elaborate a world map with the statistic of elemental education of each country and continent. This would be updated at least every ten years. This proposal recalls the earliest developments in comparison in education, a field whose constitution was also influenced by the visits to the international exhibitions.

COMPARATIVE TABLE OF THE POPULAR INSTRUCTION IN EUROPE.

NATIONS.	Extension in square kilometres.	POPULATION.	Number of schools.	Number of scholars.	Expenditure. — Francs.
1. <sup>st</sup> CLASS.	Switzerland..... 41390	2,759,654	7000	49000	8,708,174
	Germany..... 539,816	42,727,360	60000	6,010,150	140,000,000
	Sweden..... 442,818	4,429,713	8770	615,135	10,642,000
	Denmark..... 38237	1,903,000	2909	259,508	5,330,000
	France..... 528,872	36,905,788	71289	4,735,000	60,000,000
2. <sup>d</sup> CLASS.	Belgium..... 29455	5,403,000	8246	659,192	24,806,428
	Norway..... 318,192	1,807,555	6459	213,391	4,888,807
	Holland..... 32972	2,862,456	3724	444,707	15,318,136
	Spain..... 507,000	16,800,000	29038	1,632,288	26,000,000
	Great-Britain..... 314,951	33,805,419	58075	3,000,000	65,000,000
3. <sup>d</sup> CLASS.	Austria-Hungary..... 622,440	37,350,000	29267	3,044,996	69,000,000
	Italy..... 296,223	27,769,475	47411	1,931,617	27,000,000
	Greece..... 50123	1,457,894	1373	33060	2,000,000
	Portugal..... 89625	4,047,110	4513	198,131	2,025,000
4. <sup>th</sup> CLASS.	Russia..... 5,380,000	72,643,627	32000	1,130,000	25,000,000
	Turkey..... »	»	»	»	»
Sums.....	9,231,915	294,676,251	370,684	24,390,115	485,218,545

NATIONS.	Attendance to school for every 100 inhabitants.	Inhabitants for every school.	Inhabitants for every scholar.	Scholars corresponding to every school.	Annual expenditure for every school.	Annual expenditure for every scholar.	Annual expenditure for every inhabitant.
1. <sup>st</sup> CLASS.	Switzerland..... 15.22	394	6.57	60	1244	26.73	3.19
	Germany..... 14.06	712	7.02	100	2333	23.29	3.27
	Sweden..... 13.88	505	7.20	70	1214	17.30	2.40
	Denmark..... 13.63	654	7.33	89	1852	20.54	2.80
	France..... 12.82	518	7.81	66	842	12.69	1.62
2. <sup>d</sup> CLASS.	Belgium..... 12.38	655	8.07	81	3008	37.07	4.69
	Norway..... 11.21	280	8.40	33	695	20.37	2.42
	Holland..... 11.64	1035	8.70	119	4102	34.44	4.00
	Spain..... 9.72	578	10.28	56	895	15.91	1.55
	Great-Britain..... 8.87	882	11.26	82	1119	21.66	1.92
3. <sup>d</sup> CLASS.	Austria-Hungary..... 8.15	1276	12.26	104	2357	22.66	1.85
	Italy..... 6.91	586	14.37	41	569	13.97	0.37
	Greece..... 6.38	1062	15.66	67	1456	21.50	1.37
	Portugal..... 4.89	836	20.42	44	449	10.22	0.50
4. <sup>th</sup> CLASS.	Russia..... 1.53	2301	65	35	781	22.13	0.33
	Turkey..... »	»	»	»	»	»	»
AVERAGES.....	8.27	796	12	66	1311	19.89	1.65

\* The numbers referent to Turkey are not published for want of recent and duly comprobated data.

Figure 5. Vallín Frame. Data collected by Asciclo F. Vallín in his report on the situation of popular instruction in Europa. Note the grouping of nations in 'classes' according to the degree of cultural development, and the variables which are analysed (extension, population, schooling, budgets...) The quantification is a reflection of the positivist mentality which was beginning to be affirmed in the bureaucracies of the liberal period and of the value accorded to comparison as a mathematical criteria of social truth. These new values also found support in the exhibitions.



Figure 6. Map of Asciclo F. Vallín of Popular Instruction in Europe (1878). As well as constituting a modern cartographical representation, the map is a kind of social portrait which structures and fixes the perception of educational realities. Colours and diagrams, geometrically disposed to accept the numerical data, offer an image, gestaltic and analytical at the same time, of a Europe organised in nations and blocks. These subsets also transmit the idea that educational progress works in an organic and gradual way and that the move from one block to another always supposes a leap in the evolution of civilisation.



The technology of education shown in the exhibitions enters this way in the industrial cycle, reinforced by positivism, and in the economic and moral logic of efficiency, but pedagogues, not free of corporative prejudices, had relativised until not long before the value of the material as cultural production, and occasionally, from attitudes between neoidealist and critical, rejected the world of means once more. Practical teachers, book publishers, inventors and even members of the administration participated in these world events, bearing witness the fully modern attitudes. However, academic pedagogy, installed at the time in teacher training colleges and some universities, did not participate in that enthusiasm, taking shelter in speculative discourses of little theoretical and practical value. Indeed, the teacher training colleges came little and late to these world meetings. This fact showed the excision between the empirical and academic cultures, which would be a historical constant even to the present day. Differentiated values regarding criteria of modernity also operated in such dualism. This might be attributed to school practices, to the theoretical discourses and the norms governing these institutions. As is well known, this division has also affected historiography.

#### MODERNITY: AMBIVALENCE AND DIALECTICS

It was the sociologist Zigmunt Bauman who highlighted with most emphasis something which had already been pointed out by Theodor W. Adorno in *Dialectics of the Enlightenment* (Adorno & Horkheimer, 1998): the ever double headed character, ambivalent and dialectical of modernity, or, what is the same, the sustained fight of modernity to find a place between order and contingency, the system and ambiguity, tradition and change. This battle could also be seen on the symbolical level—not just that of reality—through the dialectics between the representative manifestations by which modernity introduced itself.

Society, according to the idea that Bauman adopted from Georg Simmel, is not a balanced and stable organic compound. In the internal nucleus of the modernity paradigm are the proposals for change and the reactions of the conflict that these changes raise with the past. This self-same modernity fully opened the doors to dissent, to resistance to change and even to certain forms of cultural discontent of which Sigmund Freud would later speak (Bauman, 2005, pp. 77-78). Modernity, therefore, could be seen as a cultural construct which was essentially ambivalent and dialectic, and not just as a performative register of the new, as the followers of the positivist idea of progress and the dynamic agents of the international exhibitions wanted to believe.



In several of his works, the Polish-British sociologist has set out to elucidate the artefacts of order in the change to the new, and the reactive mechanisms seen in certain systemic persistences of the past together with the threats of the future which led to uncertainty at the same time. The elimination of the ambivalence would be to deny the most obvious sense of what has happened. If modernity insists on extinguishing the ambivalence, the critical phenomenologist will raise the suspicion about the ethical and cultural consequences underlying modernisation (Bauman, 2005, pp. 26 and 48). Here Bauman echoes the Nietzschean logic of suspicion and of the negative dialectics of the Frankfurt School. Enlightened reason, as Horkheimer and Adorno saw, on which lies the myth of the modern, pursued the dominion of nature. It needed to control, and even repress, the non-rational reactions of the citizens and of the collectives which were revealed even in fully modernising contexts (Adorno & Horkheimer, 1998, p. 29).

In previous paragraphs we have alluded to the palimpsest nature of the historical ethnographies of the school, as seen in the co-existence of modern materials and visuals together with older ones, the emergent and the archaic. On examining the representations offered by ethnohistory as suggested by analyses inspired in the theoretical suppositions we have considered above, the empirical school culture which may be observed in the iconographies also suggests a dialectical interpretation of experiential reality, on planes which may be ambivalent, and sometimes even contradictory, with the logic of modernisation.

Let us see an example in order to step down from generic considerations to the plane of reality. The images which can be seen next to this text correspond to present-day schools in the Mexican region of Chiapas. One of them shows the introduction of innovations from the digital world into schools for Indoamericans. This is the one which would offer the interface of the change to modernity. Next to it, another image offers a register of the persistence of tradition: a girl works with an abacus made from local materials. These two planes represent the co-existence in the same institution, and at the same time of innovation and continuity, of modernity and *techné* rooted in the endogenous material culture of the community.

Together with these images, we see a third one which shows examples of school writings, with emoticons linked to the new sensibility of childhood today and with writings which superpose, in the form of a palimpsest, the Spanish language with the local Indoamerican language. The new strategies of assimilation and modernisation give rise to hybrid school productions in which the identifying cultural forms cohabit with those imposed by the standardising devices of modernity. These sources also suggest the co-existence in this real context of a certain bipolarity between identifying and globalising education, which is another sign of the ambivalence found on the plane of praxis between political culture and that of action.







Figure 7. Chiapas, Mexico. These images show ambiguities between the identity and the modern. They correspond to a school of an Amerindian community of Chiapas, in present-day Mexico. Innovations from the digital world together with local technologies. Emoticons which play with standardising and native writings. This ambivalent image is representative of the dialectical processes of educational modernisation.

Let us go back two centuries to discuss the above with historical representations. On examining images from another time we can also find representations of ambivalence, even in those stages considered to be modern. In the figures accompanying this point of the study, it can be seen how, at the beginning of the nineteenth century, some of the most relevant innovations are shown accompanying the national educational systems at their birth: Pestalozzi's philanthropic school, of pre-romantic orientation, and the Lancasterian mutual school, inspired by the more *militari* organisations. In the first image—that of the Stanz boarding school, founded

by the well-known Swiss pedagogue—the school is conceived as a prolongation of the home, combining study with work and the domestic practices of integration with other training experiences. The second— which corresponds to a French mutual school of the post-revolutionary period of the Restoration—presents an innovating school organisation based on the principles of order and discipline ensuring the practice of mutualism in the first initiatives of mass education fostered by the Nation States and the associations of popular education.

These scenographies have been divulged because both their creators and the historians of education have legitimated them as representations of pedagogical modernity. However, each of them shows a well-differentiated and even opposed model: the former affirms the values of naturalism, philanthropy and paternalist morality, while the latter is based on the model inspired by a mixture of patterns taken from the military life, utopian mutualism and the early industrialisation. Educators and pedagogues, that is to say, those who impulsed and applied the changes of that time and those who provided them a base and later interpreted them (the historians and theorists), saw signs of innovation in these patterns, even though both scenographies—truly choreographic—indeed suggest that modernity does presuppose a unanimous interpretation of change, but may rather adopt different modes and styles, at times even contradictory.



Figure 8.1. Pestalozzi.



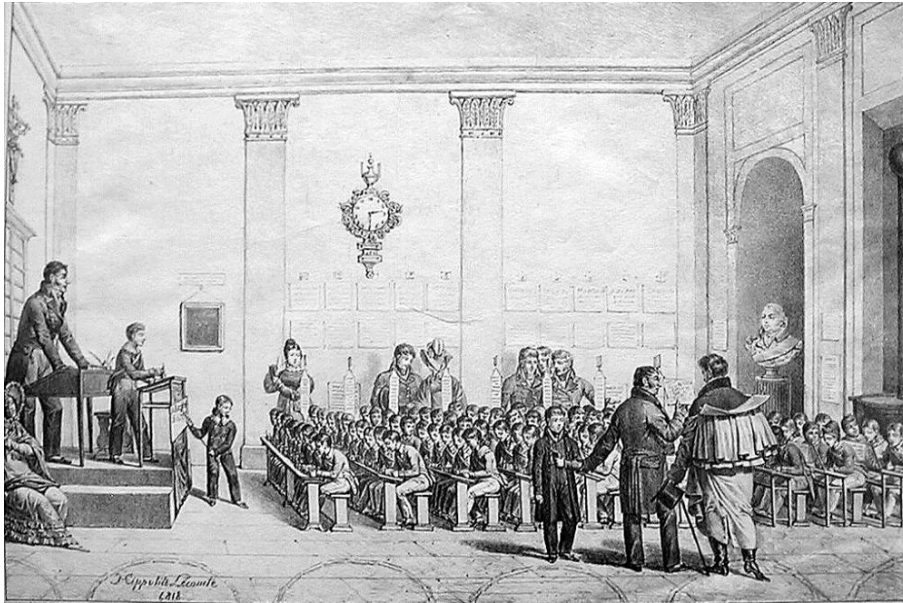


Figure 8.2. French Mutual School.

The first scene is from the Stanz Institute, Switzerland, at the beginning of the nineteenth century. Pestalozzi takes in war-orphaned boys and girls in a paternalistic attitude and in a domestic environment. The class is not a very academic setting, with furniture and decoration which recalls a family home. The other image corresponds to a French mutual school of 1818. Teacher, pupils and monitors dress in militia fashion. The chair, plinth and benches are arranged according to a structure based on monitor teaching, in sections for help and control. The clock sets the functioning times of the method and the system.

Iconic representations may also offer an image of the changes operating in each historical moment and, arranged in serial sequence, are the visual evidence of the underlying meaning in the process of evolution.

Let us see the four images:

1. English school of the beginning of the nineteenth century in a monastic setting. The children are grouped in interior microspaces: corners or sections. Each pulpit is occupied by a monitor, wearing semi-ecclesiastical clothes. He controls the times, movements and the method, as well as the work discipline. The high-roofed space could be that of a church, with high windows to receive the light and to avoid the distraction of the pupils.
2. Domestic environment school. A German engraving from the end of the nineteenth century. Boys and girls are distributed with no rigid order in the space of a small classroom, where a teacher, a member of the church, manages the educational activity with the help of a woman assistant who

carries out the traditional female activities while controlling the class activities. The pupils read, write, play, get bored, move or sit in an apparent atmosphere of calm and harmony. The furniture and the decoration combine the styles of house and convent.

3. An American school, published in a Spanish magazine at the end of the 1950s. A technocratic model of a language laboratory. The pupils are isolated in their adjoining cells but unable to interact with each other. This innovation constitutes one of the 'modernities' in the technical renovation of programmed instruction inspired by Skinner's behaviourism in fashion at the time.

4. Interactive model school. Representative of the latest generation. This model would be, in historical or evolutionary terms, the most modern. Actors and technology communicate with each other, breaking the traditional classroom geometry and its model or scheme of spatial structure. The interaction affects both the relationship between actors, pupils and teachers and that established between all the subjects and the technology used in the classroom.



*Figure 9.1.* English school in a monastic setting (beginning of the nineteenth century), *Figure 9.2.* German domestic environment school (end of the nineteenth century), *Figure 9.3.* American school (end of the 1950s), and *Figure 9.4.* Interactive model school (nowadays). Four models of innovating schools at different stages of modernisation: monastic English school; mutual school; laboratory school; interactive school. They are all, despite the differences of structure and environment, exponents of modernity in their corresponding historical period.



In these icons, ethnohistory may discover four well-differentiated ecosystems of classroom, each one of them modern at the moment they represent, and evolving progressively in the long-term view. They all show modernities which were mostly abandoned over time, although some have survived, in certain aspects, as obsolete bases or as tradition. In anthropology, a basis is something which survives even though it serves no purpose at all. Those nearer in time to ourselves, are renewed faster and with more versatility.

Halfway through last century, in the protohistory of technological change, architectures and audiovisuals could be fused in systemic models which reflected the dominant functionalism of constructions and the connectivity between spatial structures and communicative mediations. Image 10.1 offers a model of functional architectural design, whose external epidermis announces the “implicit pedagogy” of its interior, that corresponding to a school distributed in sections in graduated order. The “modulor”, which Le Corbusier defined as an architectural algorithm, is the element which organises spaces in a *continuum* which concludes with the physical closure or formal limit of the construction. This opens to the surroundings, from which it receives light and to which it adheres as a context. The schematic drawing of the means suggests, as structuring value, the interconnectivity between these and the sceneries into which it is inserted.

The previous icons may be used to illustrate how the representations may initiate readings about the modernities implicit in the exterior and interior of the spaces and in the use of the complementary technologies, which the historian or ethnologist must know how to decipher. Amongst them, we find the possible bipolarities between the technofunctional rationality shown by the exteriors and the supposed effects on the subjects of the biopolitical modes of knowledge-power which the control systems inherent in such architecture have been putting into action.

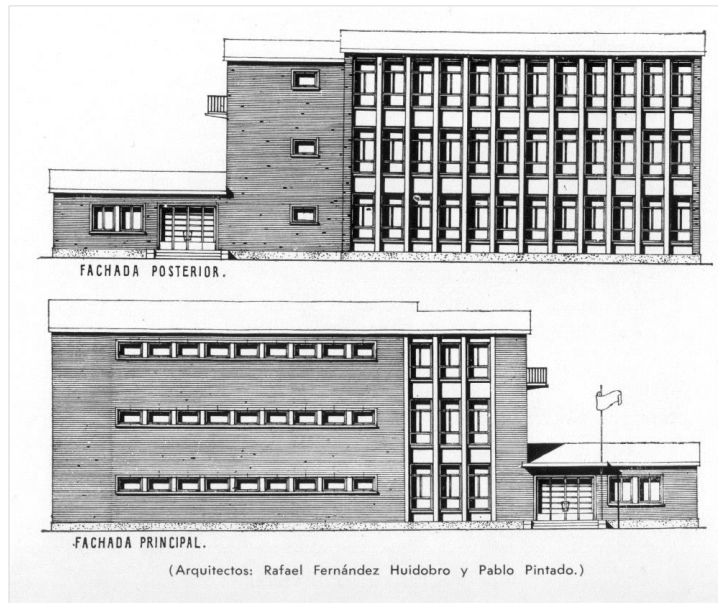


Figure 10.1. Buildings.



Figure 10.2. AVMs.

Two systemic components of the school which was modernising at the beginning of the technological renovation, in the context of industrial society (Spain, 1957): a) Functionalist architectural design, modern in its day, for a primary school centre for graded education. b) Scheme of connection and integration between the modern school architecture and the audiovisual means within it.



## HERMENEUTIC CLOSURE

In order to transcend phenomenology, ethnohistory always demands a hermeneutic closure, a dense and complex interpretation which explains the meaning of the performative codes and of the processes which show the contradictions inherent to the dialectic of modernity with tradition, to mention only the two subthemes we have proposed in this study. This is not only because mimesis is a form of cultural writing, in a large part symbolical, which must be read, explained and interpreted in order to approach the comprehension of the meanings underlying the visible signs and in the indications of representation which raise hypotheses of intelligibility, including those which may be derived from the pluritopical hermeneutics of which Antonio Valleriani (Valleriani, 2003) speaks, or those which might present iconographic alternatives proposed in the form of heterotopes, a perspective suggested as is known by Michel Foucault (1991), which is only mentioned here as an aside but which requires greater development. Interpretation is also necessary since both the models represented—in our case those relative to the modernity examined—and the languages of representation are cultural constructs.

The two fields of study on which we have polarised our attention offer explicative keys to understand the meanings of the representations which register the signals of modernity and the dialectical relationships between change and continuity. Both explanations are essential in the new cultural history of education in order to be able to reach an integral understanding of the persistences and the innovations, and, more generally, of the sociohistorical construction of the logic which underlies school culture.

From a performative perspective, the images of the modern reveal, through rhetorical forms of communication, the affirmation of cultural identities of the school and the symbolic struggles to impose some patterns over others by means of icons. The games of competitiveness between countries are the expression of market influence and of the power relations which are staged by national politics to show a hierarchical organisation of the interacting nations, which establish new forms of knowledge-power, in which school culture also intervenes. There is no canon of modernity, but at the end of the historical processes certain models are imposed and influence the creation of circles of cultural communications. Such patterns circulate throughout the national education systems and in this circulation diversified processes of appropriation operate which give rise to interpretive variants. Mutual education, for example, adopted diverse forms in India, England, France, Spain and Portugal, and this differentiation has to do with the particular characteristics of the receiving contexts. The theories of the school

of Constanza and the contextual turn of Quentin Skinner would help in the hermeneutic explanation of these peculiarities.

In the dialectical interaction of the modernities with the traditions—the second perspective of the study—the interpretative examination of the experiences under consideration allow us to question the image of linear progress which has been attributed to the modernisation of the school. In contrast, it favours a more complex, denser and more dialectical comprehension of the historical processes of innovation. It recognises the coexistence at each historical moment of traditions and changes and remits us to the consideration of a writing up of the school culture which approaches the model of a palimpsest to which we have referred on previous occasions. To this effect, modernisation would be a process in which new emerging practices cohabit with norms ascribed to the historical grammar of the school, part of the available tradition, which is a legacy of the heritage of education systems. It would also be an operation in which transferences, appropriations and resistances are produced.

The reading, explanation and understanding of all these sociohistorical processes is not only a hermeneutic act but also the categorical closure which, albeit always open to later analyses, offers an interpretation of the questions raised, in our case those relative to the modernity of the school and its culture.

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**ADVERTISING, MARKETING AND IMAGE:  
VISUAL REPRESENTATIONS AND SCHOOL MODERNITY  
THROUGH POSTCARDS (SPAIN, THE TWENTIETH CENTURY)**

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**ABSTRACT**

By the end of the nineteenth century picture postcards had become an advertising tool for businesses, and their importance would grow still more during the early decades of the twentieth century. Primary, secondary and professional schools of education (especially those of a religious nature) were also quick to make use of them, and state schools built at that time would, albeit somewhat later, follow suit. These postcards served as a “business” or “visiting cards” for these educational institutions, which used them to show families and the general public the image, and images, by which they wished to be known. This paper analyzes the general evolution in Spain of this modern type of advertising, which transmitted socio-cultural values and created school identities, while also looking at the different uses that were made of them, the norms followed and the diversity of images offered by some educational institutions.

**KEY WORDS**

Postcards; Educational modernity; School image and advertising;  
History of photography; Spain, twentieth century.



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# Advertising, Marketing and Image: Visual Representations and School Modernity through Postcards (Spain, the Twentieth Century)<sup>1</sup>

*Antonio Viñao and María José Martínez Ruiz-Funes*

## MODERNITY: A POLYSEMIC AND CHANGING CONCEPT

The concept of modernity, alone or in conjunction with the concepts of modern, modernization or modernism, is, as Le Goff (1991, pp. 145-173) showed, a polysemic, ambiguous, changing term with connotations that can imply praise, disapproval or may even be simply neutral. This polysemy and variety in time and place need to be seen in the widest complex of conflicts and struggles around the control of language—i.e. the imposition of one meaning or another on the word—, as well as to be related to the existence, or non existence, of an awareness at all times and in all places of being, or not, before a new time, and whether to define itself as modern. Lastly, there is the question of using this term to characterize others be they contemporary or previous in time (Koselleck, 1993, pp. 287-332). Thus, in a study of this caliber, it is necessary to state precisely which concept or idea of modernity is taken as the starting point, and what meaning is being attributed to the word.

Modernity can be considered from various approaches: artistic-esthetic (modernist style, modernist poetry); philosophical-rational (Enlightenment, critical reflection, instrumental rationality or that of action; reason versus religious-dogmatic authority); scientific (genesis of modern science); historical (the Modern Age); sociological (processes of modernization and secularization; whether fashionable or not, being or not being modern in one's clothing, external appearance, customs, language, hobbies, likes, behavior or manners); economic-commercial (rationalization of production, advertising, marketing, merchandizing); technical and scientific (technology, mechanization, home electronic devices used in daily life and in the communication, production and transmission of knowledge) or educational-cultural (processes of literacy, schooling, feminization, professionalization of teachers and dissemination of

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written culture). Our choice of approach will determine the meaning, and we will find ourselves immersed in different periods, places and social groups. In this paper we will seek to avoid any judgmental connotation, be it laudatory (linking the idea of modernity with progress or modernization) or pejorative (as something insecure or uncertain that aims to destroy the traditional, in the sense of safe and of value), and will employ a triple technological, economic-commercial and sociological-cultural approach.

The approach is technological in that the analysis focuses on an object, the picture postcard, developed through the confluence of a series of innovations in the world of printing and production of images at the end of the nineteenth and the beginning of the twentieth centuries. It is economic-commercial because this new object would be used by some educational institutions as an advertising tool to make themselves known and to attract, through images, certain students and families; or these institutions, as well as other public and private bodies, would use them as a way of advertising their actions and activities. The approach is sociological-cultural because the picture postcard was not just a privileged and widely used means of communication between persons and of transmitting socio-cultural values, in this case in the field of education and schooling, but using it was itself a statement of one's desire to be up to date, to be modern by employing one of the visible signs of modernity—the printed image.

#### SCOPE AND LIMITS OF THIS STUDY

Given their ever broader dissemination thanks to the postal service, picture postcards were by the end of the nineteenth century and especially during the early twentieth century (their “golden age”) advertising tools that were used by businesses, and these included primary, secondary and professional schools (particularly those of religious orders and congregations), which would later be followed by groups of state schools built in those years, and also by education administration. In a manner of speaking they were a business or visiting card (be it as single picture postcards or as part of an album, rather like the souvenir postcards of cities and other places) of these educational institutions which used them to present families and society as a whole with the image or images by which they desired to be known. This article analyzes the general evolution in Spain of this sign of modernity and advertising tool which served to convey socio-cultural values and to create school identities, and it also examines the various uses made of it, the general norms followed and the diversity of social images offered by some educational establishments.

## THE PICTURE POSTCARD: DEFINITION AND BASIC FEATURES

The various definitions or characterizations of the postcard as an object usually take into account its mounting, the content (not always) and its postal use or function. They do not, in the main, consider other uses, such as collectors' items, commercial advertising, political propaganda, or their testimony, for example, to a person's having been in a certain place. One example of such definitions is that put forward by Albert Thinlot in his history of the picture postcard in France: "printed matter on a semi-rigid support for postal use bearing a brief visible text" (Sánchez & Villena, 2010, p. 11). However, this definition is valid for both picture postcards and "plain postcards", which began to circulate in the Austria-Hungary Empire on December 1st, 1869 (in Spain, private ones appeared in 1871 and official ones on December 1st, 1873), and bore no picture or illustration whatever. A simpler definition, and one that fits our purpose better, is that of Ado Kyrrou (1966, p. 7): "a card, one of whose sides is for the purpose of correspondence and the other is illustrated". However, this does not cover the earliest picture postcards whose front bore both a picture or an illustration, and also left a space for a written message, while the reverse side was exclusively for the details of the addressee. This "semi-occupation" of the front by a picture would change in 1906, when the picture displaced all written text to the reverse side of the card when the agreement adopted by the Universal Postal Union in 1905 which divided the reverse side into two halves came into effect, with one side for the address and the other for a written text. "As a result of this 'liberation', the pictures were able to grow until they occupied the whole front of the postcard", or most of it, for they sometimes had a border or a space where the theme or content of the picture was proffered: "there is a before and after 1906 in the production of picture postcards" (Riego, 1997, p. 24). In short, this paper deals with picture postcards with school or educational content which contain one or more pictures on the front, which are sometimes accompanied by a short printed text that alludes to the picture or pictures and, only in the earliest versions, a space for a written text, while on the reverse side there is a specific space set aside for franking, another for a written message, the addressee's details and, on occasions, some succinct information about the printer's, the photographer, the content of the picture or pictures on the front of the card, or even, from the 1960s, the statutory deposit.



## BEGINNINGS AND DISSEMINATION OF AN INTERNATIONALLY REGULATED PRODUCT OF SOCIAL COMMUNICATION

As Bernardo Riego has described, the picture postcard appeared at the end of the nineteenth century as a result of the confluence and interaction of three elements:

a postal exchange system organized by States that normalized and facilitated its legal social dissemination; a shared code of international scope that understood printed images as a vehicle for the transmission of cultural values; and, finally, the technological development in printing had enabled the mass reproduction of images photomechanically at a low cost. These three premises date from the twentieth century, when the necessary steps were taken that would lead to the birth of the *picture postcard*. It was to be a characteristic product of our century [twentieth century]; however, it did not appear out of nothing, but was due to the norms of cultural sociability that had been hatched earlier among the bourgeoisie. (1997, p. 22)

Indeed, although by the second half of the nineteenth century the collections or albums of photographs and business cards of diverse themes, along with woodblock printing in the printed illustrations had already generated the idea of a universal museum that reflected the world through pictures, it was with the arrival, during that period, of the phototype, the photoengraving and the rotogravure that an awareness that this idea was technically possible was born, and it would spread to the middle and working classes. After the phototype and the photo-chromotype came the postcards produced using gelatin bromide, between 1897 and 1900, with their shiny surfaces. These were true photographs “adapted to the form, size and other characteristics of the postcards”, and they would become widespread and commercialized from 1905 (Roig, n.d., p. 14).

The second element was the use of the cards as a postal object. There are various theories regarding the origins and the first specimens of postcards. Brady (1969, pp. 848-849), for example, alludes to the first private postcards, accepted as postal items in the United States in 1861 and even to earlier examples from France and England, dating back to the late eighteenth and mid nineteenth centuries. However, it is widely held that the first official postcards appeared in an issue of 140,000 postcards in Vienna in 1869: they measured 12 x 8 cm. and bore the effigy of the Emperor Franz Josef. They were quick to catch on elsewhere: Hungary (1869), the two German Confederations, the United Kingdom, Switzerland and Luxemburg (1870), Belgium, Holland,

Denmark, Sweden, Norway and Canada (1871) Russia, Chile and France (1872), and the USA, Italy, Spain, Romania, Serbia and Japan (1873) were all immediate adopters of this new postal device that catered for brief messages at a cheaper postal rate than that of a letter. Their circulation was to change from being merely domestic to international in 1875.

There was also a growing need to internationalize and normalize international mail and this led to the creation of the General Postal Union in 1874, which in 1878 would be renamed the Universal Postal Union. It was in that year that it normalized the postcard in terms of dimensions (14 x 9 cm.), franking, printed features and conditions of international exchange. This also served to foster a practice that had already begun to spread into private education for advertising or purely commercial purposes.

The inclusion on the front of an illustration of some nature or another which, prior to 1906 occupied just a part of it would not tarry. The first picture postcards were produced in Germany in 1870 by the lithographer Miesler. By 1871, postcards illustrated by a German engraver from Nuremberg were already circulating in Switzerland. In March 1872, a German artist, Franz Borich, reproduced his drawings on cards and, in the light of their success, contracted photographers and used phototypography to produce postcards showing Swiss scenery. The exhibitions in the last quarter of the nineteenth century—Dusseldorf, 1880; Halle, 1881; Nuremberg, 1882; Amsterdam, 1883—and, especially the Paris Universal Exposition of 1889 with its views of the Eiffel Tower, taken from gravure prints by Libonis and published in *Le Figaro*, would suppose “the great springboard for the picture postcard” (González & Torcida, 1997, p. 119). The first picture postcards were lithographic prints with several vignettes with drawings of views and monuments and the legend “Gruss Aus”—the German for “Greetings from”—followed by the name of the town or city. The huge success enjoyed by this format in Germanic countries led to its spreading to other countries, with the legend being translated or adapted accordingly (González & Torcida, 1997, p. 119).

Thus, a new product whose aim was first and foremost to communicate brief texts of a commercial nature and at a reasonable price had arrived, and was, progressively, to become an open means of cultural communication between individuals of all manner of subjects. Potentially, at least, the front of the postcard would be able to contain anything whatsoever: the sights of a city (monuments, buildings, streets, markets, churches, ports, stations, convents,...); spectacles and events (carnivals, *fiestas*, fairs, processions, bullfights,...); pictures of museum articles (paintings, sculptures); tourist areas, countrysides; portraits of monarchs and political figures, figures from literature, sport, actors, actresses singers, bulls, etc. These could be figures from the past or from the present. There were also scenes from the world of work and from daily life, some of them specifically conceived and recreated to appear on postcards. There





were postcards of extraordinary events (exhibitions, accidents, floods, royal visits, fairs, social movements and the like). Then there were typical scenes of customs and traditions, artistic cards, commercial cards, propaganda cards, erotic, childish, romantic, satirical, humorous cards, cards conveying Christmas wishes, cards of wars and battles, in fact there were cards for almost anything (Guereña, 2005, pp. 46-58). A whole universe of images taken from the real world or drawing on the imagination could, finally, be produced, disseminated, sent, exchanged and collected. The title of Andrea Rapisarda's book, *Il mondo in cartolina, 1898-1918* [The world in postcards, 1898-1918] (1983), reflects perfectly the, in theory unlimited, thematic diversity and the new awareness of having the whole world within one's reach from the comfort of one's own home, either as a collector or simply as the owner or receiver of picture postcards.

Yet, "as occurs with any technical product, once the postcard outgrew its specialized area of commercial communication", it moved into "new social uses" and redefined "existing ones" (Riego, 1997, p. 25). In the words of Boris Kossoy, its arrival

represented a real revolution in the history of culture. The mental images of the so-called real world and those of the individual and collective fantasy universe were finally made available to the masses. This portable, abundantly illustrated world was a prime candidate for collections with its endless stream of subjects and would finally satiate the public's imaginarium. (2014, p. 181)

In 1899, 30 years after their appearance, and just a year before the dawn of their "golden age", 88 million postcards were printed in Germany, 14 million in United Kingdom, 12 million in Belgium and 8 million in France. Eleven years later, in 1910, the number for France had soared to 123 million. Their popularity grew with the arrival of deltiology and with it, the birth of specialized clubs and magazines, especially in the early twentieth century (Kyrou, 1966, pp. 9-13, with the emphasis on France). As Brady states,

In some European countries (...) postcards had already become the subject of a wild collecting craze; it was the fashion to amass postcards of diverse types, and clubs and societies were formed which enabled their members to exchange cards. Postcards were on sale everywhere. In Germany, for instance, it was commonplace in cafés and restaurants to see a postman, with a mail box strapped to his back, moving among the tables, selling postcards and stamps—which could be posted immediately in his box. Exhibitions of picture postcards were organized. The first was held in Venice in 1899 and others were staged later in Nice, Ostend, Berlin and Paris. A Cartophilic Congress was convened in Prague—

the name being coined to describe the new hobby. A rejected alternative name was “Cartomania”, but it is arguable that it might have been a better description of what was going on. (1969 p. 851)

There seems to be a widely accepted agreement that this “golden age” began in 1899-1900. For example, Kyrou (1966, p. 11) opts for it to have coincided with the Paris Universal Exposition of 1900, the same year as the first postcard exhibition was held, also in France. Where opinions differ, however, is when it ended, because, among other reasons, this depends on the qualitative or thematic-qualitative employed. For Brady, who limits the duration of the “golden age” to the first two decades of the twentieth century,

During the First World War censorship problems and rising postal costs, among other factors, contributed to a diminution of public demand and the development of new communication systems, such as the telephone, encouraged the continuation of a declining trend. By 1948-49 the inland mails carried 216 millions cards—only a quarter of the peak demand of earlier years but still a formidable source of postal revenue. (1969, p. 855)

In Spain, there are those who fix its ending in 1905 (Teixidor, 1999, pp. 11-15), others who see it as extending until the outbreak of World War I in 1914, and still others who prolong it until 1931 or even 1936. In the case in question here of postcards whose subject was schools, we would provisionally hypothesize still later dates given the high number of albums, wallets and separate postcards whose theme was educational institutions that abounded in the 1940s and 50s.

The first picture postcards related to Spain are, it seems, two phototypes of Granada produced in Germany in 1890. Two thousand were printed but the whereabouts of them all is today unknown. The first known ones were printed by Hauser & Menet, a printers’ house set up in Madrid in 1890, and are postmarked 1892. They already bear the classic “Souvenir of Madrid” wording and four photographs on the front: the bullring, the San Jerónimo street, the “Puerta del Sol” and the Alcalá Street. Another candidate for the first “Spanish” picture postcard is one printed in Zurich which portrays the Hotel Santa Catalina in Las Palmas, of which there are examples postmarked between 1892 and 1895 (Teixidor, 1992, pp. 9-10, 1999, p. 11). Whichever of the two, 1892 is for the moment the year in which the first known “Spanish” picture postcard seems to have appeared, although we cannot discard a hypothetical date of 1890 or 1891.

Hauser & Menet, which produced 40% of the picture postcards printed in Spain in the nineteenth century, and which in 1892 sold just 200, had by 1902



amassed a collection of 1,300 different cards and a production that never dropped below 500,000 a month. By the turn of the century there were nearly 150 printing houses in Spain, or abroad but with postcards referring to Spain, that were printing, publishing and selling picture postcards, some of which were not for public use. An outstanding example from 1905 in Barcelona was Ángel Toldrá Viazo (A.T.V.) (Boix, 2002). From 1906 to 1915 this technologically state-of-the-art industrial sector had become fully consolidated (Sánchez & Villena, 2010, p. 32; Teixidor, 1999, pp. 15-23). Well known photographers would also become associated. In some cases, for example, that of the Madrid-based Lacoste & Co., this was because they considered themselves the successors of Jean Laurent, the Queen's photographer from 1861 to 1868, and of his photographic collections which were sold as business cards (Pérez, 2015, pp. 270-290), while in others, like Antonio Cánovas del Castillo ("Kaulak"), it was because of the publication of some of his photographic compositions in the form of postcards with the help of printers like Lacoste & Co. and Hauser & Menet. For example, there was the collection of ten postcards on *Las Doloras* by the poet Ramón de Campoamor, which sold 180,000 collections, or 1,800,000 postcards in Spain and Latin America (Los editores, 1905, pp. 9-10).

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Figure 1. Hauser & Menet advertising inserted in the *Boletín de la Tarjeta Postal Ilustrada* (December, 1902). The generation of deltiology magazines and clubs would accompany this movement. 1901 saw the birth of the *Boletín de la Tarjeta Postal Ilustrada*, followed by the *Boletín Cartófilo Artístico-Literario* (Barcelona), *El Coleccionista de Tarjetas Postales* (Madrid) and *España Cartófila* (Barcelona) the magazine of the Spanish Deltiology Society ("Hispania") which in 1902 boasted over 300 members, and 1906 witnessed the arrival of *El Mundo Cartófilo* (Valencia) from the Deltiology Club known as "La Ideal".



Figure 2. Front cover of the magazine *España Cartófila* (1901). The earliest reliable statistics on the number of postcards in circulation in the Spanish postal system refer to the period 1910-1919. Table 1, which is our own and is drawn up from an official publication, shows the growth from the 15,563,110 postcards in 1910 to the 18,605,033 in 1919, and the total number in circulation in those ten years, which reached 172,642,716. The figures also reflect the negative effects of the Great War, especially in terms of international circulation—cards received from or sent to other countries—with the domestic circulation doubling over the course of the decade, rising from 8,834,698 in 1910 to 15,143,324 in 1919. These figures were lower in any case per number of inhabitants for the same years than those of France, Germany or the United Kingdom, although, from our own calculations based on the official statistics yearbooks, they were to rise to 24,742,273 postcards in 1933—18,037,079 in domestic circulation and 6,705,194 internationally. After the negative effects of the Second World War, the social and economic stagnation and the ensuing international isolation during the first fifteen years of the Franco regime, the later economic growth and the progressive opening up of Spain saw the numbers rise to 58,809,160 in 1960—48,740,420 in domestic circulation and 10,068,740 internationally—and, in 1969, to 179,995,000, of which 156,383,000 were in domestic circulation and 23,612,000 international.



Table 1  
*Postcards in Circulation in Spain (1910-1919)*

Year	Domestic	International	Total
1910	8,834,698	6,728,412	15,563,110
1911	9,388,224	6,442,080	15,830,304
1912	11,080,824	6,166,800	17,247,624
1913	13,460,814	6,584,898	20,045,712
1914	9,724,950	5,035,884	14,760,834
1915	14,505,416	3,007,667	17,513,083
1916	14,667,537	2,788,595	17,456,132
1917	14,088,180	3,764,491	17,852,671
1918	14,310,001	3,458,212	17,768,213
1919	15,143,324	3,461,709	18,605,033
<b>Total</b>	<b>125,203,968</b>	<b>47,438,748</b>	<b>172,642,716</b>

Source: Own, drawn from data provided by the *Dirección General de Correos y Telégrafos* [Spanish Postal and Telegraph Head Office] in *Los servicios de correos en España. Su estado actual y proyecto de ampliación y mejora de los mismos*, Madrid, Artes Gráficas “MATEV”, 1920.

Observations: a) the figures for 1920 are not included as they are clearly incomplete; b) the data provided by this source usually pertain only to the number of postcards managed by the postal service; c) the international figures refer to postcards sent and received from abroad; d) information on in transit postcards is not given, which, in any case, only became available from 1915.

## THE POSTCARD AS A MEANS OF INTERPERSONAL, SOCIAL, CULTURAL AND EDUCATIONAL EXPRESSION

Broadly speaking, those who developed or commissioned this “shop window” of a country that picture postcards provided were those who determined what was “best and most representative” of it, what could and should be made visible to all and, at the same time therefore, what should not or did not deserve to be disseminated through images (Riego, 1997, p. 27). The willingness or desire to choose some subjects rather than others for commercialization and diffusion reflected certain cultural values. Thus, in the Spain of the beginning of the twentieth century there were those holding a cosmopolitan view of the picture postcard who saw it as a new “means of propagating civilization and fraternity between peoples” (Bassagoda, 1904),

while others, whose chauvinist mindset, proper to the regenerationalist nationalism in Spain at the time, saw in the picture postcard an opportunity to show the world the country's monuments, scenery and customs (L. B., 1901, p. 32). Then there were others, supporters of more regional nationalisms, who shared similar aims and who used the picture postcard, as occurred in the 1920s and 30s with the Catalan *Associació Protectora de l'Ensenyança*, which displayed the monuments, urban and country sights, customs and the like that were most emblematic of Catalonia. There were those, too, who sought to show off their educational and cultural values:

the postage stamp shows, with no feeling, the political geography; the picture postcard reveals it even better, because it does not limit itself to the name of a country, its monarch or head of state and to a type of currency, but it expands into the description of cities and landscapes, of monuments and customs, it popularizes and makes available to rich and poor and to people of all persuasions alike what was hitherto the exclusive privilege of books. (Cánovas del Castillo, 1901, p. 2)

It was even to become a teaching tool in primary and secondary education and a trusted method of regenerating Spain:

What foreign texts might one cite to demonstrate that in Switzerland, Germany and in other countries which are widely held to march at the forefront of civilization, there is a fostering of enthusiasm among schoolchildren to learn political and physical geography and to accustom them in the contemplation of works of art from all countries? Truly, one does not teach only through books, but through other means too, which while apparently insignificant, at times yield better results (...).

I finish, therefore, by saying that postcards are called on to play a part in the regeneration of Spain, and, in faith, it is better that we achieve this in such a gentle and pleasant manner. (J. P., 1901, p. 50)

Of course, the picture postcard would also be used as a means of propaganda in order to project certain political ideas or to make people considered to be of cultural, political or ideological relevance better known. Here are a few examples, of an educational-cultural nature, included in the collection of postcards of the "Centro de Estudios sobre la Memoria Educativa" (CEME) of the University of Murcia: Tolstoy, Schiller, Kant, Goethe's garden, Goethe-Schiller, Diderot, Jules Simon, Goethe and especially Pestalozzi among the foreigners, while Spaniards represented included Joaquín Costa, Manuel



Bartolomé Cossío, Francisco Ferrer Guardia, Marcelino Menéndez Pelayo and Jaime Balmes, or the statue in Madrid to Claudio Moyano, the minister responsible for the Public Instruction Act of 1857. There were even series of cards with unquestionable ideological aims, as was the case of the eight series published from 1931 by the journal *Estudios*, which had an anarchist slant. Each series comprised twelve figures: “a philosopher, a poet, an artist, a revolutionary, a sculptor, a musician, an inventor, a pioneer, a discoverer, a great novelist, a writer and a pedagogue”, among the last were to be found Pestalozzi, Giner de los Ríos, Ellen Key, Claparède, Rousseau and Desmoulins. All this was done with

the noble purpose of disseminating and stimulating a love of study, and not to contribute to any type of idolatry. We simply wish that each person, when beholding these men who have stood out for their useful and fertile labors in the revolution of human thought, feels the desire to know more about their lives and to study their works. (Almarcha, 2009, pp. 42-43)

#### THE POSTCARD AS AN ADVERTISING AND MARKETING TOOL

The picture postcard is a means of interpersonal expression and communication; a means which, as has been said, reflects, or is, the product of certain social and cultural values which it reinforces and memorializes. In our case, the educational institutions, or their patrons or the entities on which they depend, aware of the creative and productive function picture postcards had for memory, began to commission the production of albums or postcards with the express idea of preserving, creating and constructing memory. Resorting to mottos such as “Souvenir from...”, sometimes printed on the front cover of the album much in the manner of the wording used on those of cities or certain places, were a sign of the link between card-image and memory.

Whether expressly stated or not, this recordatory desire demanded that any educational institution that used this new tool first commissioned from a printers' and from a specific photographer some specific images of itself, and not others, that conveyed the image it wished to offer and create. Picture postcards thus became an element that made up the individual and social image-memory of the institution to which they referred. They acted as a visiting card and a presentation in society. They showed how the institution wished to be seen, visualized and remembered socially. The edition of booklets and wallets with a specific number of postcards, or loose postcards, presupposed a specific desire to influence and condition the social image-

memory of the institution. Likewise, the selection of the images reflected a specific conception to be presented to society. Any study of these postcards must, therefore, bear in mind:

- The purpose behind the desire to publish images.
- The choice of images in each case.
- The formation of some norm for the common places to be shown and the order in which to show them, which was widely adopted by the educational institutions and the printing houses.
- The differences in the choice and order of the album or wallet according to the type of institution—formal or welfare education, the level of education, whether it was state or private, for boys or for girls, etc. or the purpose for which a series of pictures was commissioned.
- All of these in relation to the various stakeholders in the process: the commissioners—in this case, the educational establishment or its owners; the producer—the printing house; the photographer; and those who acquired and used them for whatever purpose—postal correspondence, collecting, souvenir, etc.

As regards the commissioning, production and use, postcards, both plain and, especially, picture postcards, were used as a means of advertising and for propaganda almost from the very outset. Among the publishers related to the world of teaching, Bastinos in 1873 and Calleja in 1902 would use this advertising tool (Carrasco, 2004, p. 15, 2013, p. 31). There were six facts or aspects, listed below, that explain why teaching centers commissioned booklets or wallets with separate cards that either unfolded or were loose, for recordatory purposes, of course, but also for advertising, propaganda and marketing—especially early on by religious schools, but soon after by other welfare teaching establishments, school camps and state schools.







Figure 3. Picture postcard from the Calleja publishing house (c. 1902).

The first is the hypothesis that in more than one case the commissioners were schools of religious orders or congregations whose members hailed from France—Brothers of the Christian Schools or Lasallians, the Company of Maria or Marianists—fleeing the anti-congregationalist laws of Waldeck-Rousseau (1901) and Combes (1902), or those whose origins were in that country where the practice was already used and known. Thus, for example, the first postcards from the Lasallian School “Nuestra Señora de la Bonanova”, in Barcelona, dated 1902-1903, were commissioned by its director, Brother Adolf Alfred, who was of French origin, from the printer A. Berger Frères de París (Hill, 2009, p. 13). Or that the three well known postcards of the Madrid “Collège du Sacré-Coeur de Jésus”, run by the Daughters of Charity, a congregation of French origin, were produced until 1904 in Paris by David from photographs of Levallois (Carrasco, 2013, p. 53). From a broader perspective, were this to be confirmed, this would be just another case of transfer, an import, of a practice already in use in teaching establishments, generally private, in other European countries. A proof of this transfer is that among the first picture postcards printed by Hauser and Menet, a Madrid editor of picture cards, here are two, dated 1898 and 1902, from the school “El Porvenir”, built between 1892 and 1897 by the German Evangelist pastor Federico Fliedner, and another of the evangelist chapel and schools in the Madrid quarter of Chamberí, which were built by English pastors (Carrasco, 2013, pp. 52, 67). Similarly, as regards Barcelona, the first albums of picture

postcards were commissioned by the Lasallian Brothers (the recently mentioned school “Nuestra Señora de la Bonanova” in 1902-1903 and the “Condal” school in 1907) and the girls’ schools, as well as by congregations of French origins, by the nuns of “Jesús-María” and from “Nuestra Señora de Loreto”. All these would then be quickly followed by the Jesuit schools and the Piarist schools and the Congregation of Mary in Barcelona (Boix, 2002, pp. 577-628, 645-654).

The second is that once the practice had been introduced, there was little choice but to follow it for its symbolic prestige and its success on the “market” of potential school customers.

The third was that it was an indirect and subtle way of advertising. Obviously nobody said openly that the commissioning and production of the picture postcards were for motives of advertising or publicity, rather they were to serve as a souvenir for the students who could use them, instead of a letter, to communicate with their friends and families, although, of course, they would also be used by the staff and directors and even owners of the establishment. The educational center therefore had its own “captive audience”, which was more or less forced into using its postcards. Of course, the booklets, wallets and loose postcards could also serve as gifts, at opportune moments, to the students, authorities, visitors, families or they could even be purchased by the last of these so that they could show or contemplate in their own homes the places where their offspring were studying or living. In one way or another, as Albert Hill concludes in his two articles on the four “ancient” albums or series of postcards from 1902-1903, 1908, 1914 and 1920, and the five “old” albums or series from the 1930s, 1942 and 1956, from the school “Nuestra Señora de la Bonanova” in Barcelona, the printers of these school postcards “were commissioned to produce them as images that served to advertise the centre” (Hill, 2014, p. 33). Likewise, the album containing 20 postcards of the “Colegio Cántabro” in Santander, published between 1924 and 1930, is, without any qualms at all, included by Manuela Alonso Laza among the “advertising postcards” together with those of “businesses, hotels, restaurants and a long etcetera of buildings devoted to trade and tourism” or institutions like the “Valdecilla” hospital or the “Menéndez Pelayo” library (Alonso, 1997, p. 80).

The fourth aspect is the result of the confluence of the recordatory function of the postcards with the configuration or reinforcement of a feeling or sense of belonging to an educational institution which is materialized in certain images that will evoke the memory of this. It is not so much the current students who are identifying themselves with the institution, although this is also true, but rather the former students. It is one more tool in the wider context of a series of devices like school associations, sports teams, community acts, ex *alumni* associations, uniforms or garments, hymns and songs, etc., that are all aimed at creating and evoking feelings and



emotions associated with membership of a clearly defined school with its own history and tradition.

The fifth aspect is closely knitted to content or subject matter of first picture postcards issued in Spain, or about Spain, at the end of the nineteenth and early twentieth centuries. Indeed, a review of these reveals how among the emblematic or historical buildings deemed worthy of being reproduced were, along with those of cultural standing (the Prado Museum, the National Library, the Alcalá General Archives, the Archives of Simancas), welfare education (hospices, foundling homes), some scientific buildings (the Astronomical Observatory, the Metereological Institute), the ancient universities and university colleges (Salamanca, Valladolid, Santiago, Alcalá de Henares, Barcelona, Oviedo, Valencia), some faculties (Medicine in Barcelona and Saragossa), secondary schools (“Jovellanos” in Gijón), academies and schools of engineers or the army (Guadalajara, Madrid, Bilbao, Valladolid), music schools (the municipal school in Barcelona), ecclesiastical seminaries (Oviedo, Santiago, Lérida), private universities (the Jesuit University of Deusto), colleges of religious orders and congregations (the Jesuits of Barcelona, Valladolid, La Guardia and El Puerto de Santa María, “Sagrado Corazón” in San Sebastián, the El Escorial School of Higher Studies), and the state schools built by Indian immigrants like the primary and secondary schools in Guarda (La Coruña). In other words, with no direct attempt at seeking publicity or fame, the very nature of the product leads to a variety of teaching centers and establishments that were deemed meritorious of forming part of that set of monuments or emblematic buildings that should be reproduced in the series of postcards of one city or another. Once the road had been opened there was no stopping the tide of teaching institutions that incorporated the picture postcard into the advertising strategies to announce their prestige.



Figure 4. Jesuit University of Deusto. Main façade (1902).

The sixth, and last, aspect to consider is that of the picture postcard as a sign of modernity and adaptation to the “latest trend” and to the preferences of the well-off classes, as an additional feature in a general context of educational modernization of Catholic orders and congregations (Dávila & Naya, 2012; Fullana & Ostolaza, 2007; Kössler, 2009). The postcard “is a product that symbolizes that modern time like none” (Riego, 2011, p. 14). It was the time of the cinematographer, born in 1895, of “amateur photography”, thanks especially to the launch in 1888 of the Kodak camera with its “You press the button. We do the rest”, and of the illustrated magazines. In short, the age of “a society stimulated by new images with new mountings and a society that also collected picture postcards that covered almost every imaginable theme” (Riego, 2011, p. 13). Besides, in the case of the Catholic orders and congregations, the pictures selected offered these social classes not only technological-cultural modernity in terms of the product, but also monumentality, catholicity–chapels, religious images, architecture with religious echoes–, information about the everyday inhabited areas–dormitories, bathrooms, refectories, kitchen, medical dispensary, etc.–, and the new, and therefore modern, educational installations– libraries, natural history museums, laboratories, sports fields, etc.–; in short social and scholarly distinction.

#### THE BOOKLETS AND WALLETS OF PICTURE POSTCARDS

In another paper (Viñao & Martínez, 2016) we carry out a provisional typology of picture postcards of educational or school themes, in which we outline, at the end, some of the singular aspects that need to be taken into account when analyzing the albums or wallets of certain teaching centers commissioned by their directors or owners.

Postcards that make up booklets or parts of wallets form a set of postcards of an educational establishment–in a broad sense that includes school camps and cradle homes. These could be of the type that unfold into a chain of postcards or in a booklet with perforations on the left hand side, or simply stored separately, or not, in a wallet. The postcards bear a brief reference to the picture and, in general, follow a set order regardless of whether they are numbered or not.

The content and order of booklets and wallets of postcards, the elements and the arrangement of these in a “shop window” or “display case” reflect the aims of the entity or persons commissioning the product, the conception that they wish to offer of the teaching centre, its nature (religious-private, lay-private, state, welfare education; teaching level or modality; target



audience; type of students in terms of sex or social group; etc.), and a specific idea as to how to relate what one wishes to relate, be it in selected images or through the order and arrangement of the postcards. In short, how the “shop window” or “display case” is presented will provide one representation or another in the individual and social souvenir imaginarium.

The first booklets and wallets of postcards were produced under commission of the owners or directors of educational institutions and pertain to Catholic orders or congregations. They are three printed collections from Hauser and Menet: two in 1901—ten postcards—and 1903—nine—about the Jesuit secondary school “Nuestra Señora del Recuerdo”, or “Chamartín”, in Madrid, and another published around 1904, with ten postcards of the “Colegio Comercial Nuestra Señora de las Maravillas” (Madrid) belonging to the Sisters of Christian Schools (Carrasco, 2013, pp. 51-52), plus the already cited collection published in Paris by A. Berger Frères 1902-1903, commissioned by the “Nuestra Señora de la Bonanova” school of Barcelona and containing twenty postcards (Hill, 2009, pp. 13-16). Their content, with some variations, would lay down the norms regarding how to present oneself in society through selected images, aspects of their contents, order of presentation, and therefore should be viewed.

The order invited the beholder of the collection to enter the establishment from the outside and then move around the various rooms and spaces inside. The early postcards offered first a general view of the building or the main entrance area, the façade or other angles worth contemplating. They then showed the entrance itself or the hall and the visitors’ room. These were followed by the chapel, the dormitories, the bathrooms, the refectory, the library, the natural history museum and the study room, before ending with the gardens. As an example, we can take the contents of two albums, the first incomplete:

- “Colegio Comercial de Ntra. Sra. de la Bonanova” (Barcelona, 1902-1903):  
1. Entrance Gate. 2. Avenue and driveway. 3.?. 4. Magnolia Patio. 5. Main façade. 6. Hall.7. Arcade in the hall. 8. The Corridor of St. John the Baptist of La Salle. 9. Entrance to the main staircase. 10. Reception room. 11. Kitchens. 12. Refectory of the 1st Division. 13. ?. 14. A study room. 15. Part of the museum. 16. Playground and rear façade. 17. Rear tower. 18. Dormitories of the 1st Section. 19. Washroom. 20. Grotto of Our Lady of Lourdes.
- “Colegio Comercial de Ntra. Sra. de las Maravillas” (Madrid, c. 1904): 1. Main façade. 2. Main entrance. 3. Hall. 4. Visitors’ room. 5. Chapel. 6. Dormitories of the 2nd section. 7. One of the refectories. 8. Outside view of the chapel. 9. Detail of the park. 10. Rear façade of the gardens.

When the booklet or wallet was generalized to 20 postcards, this norm allowed for some variations: sometimes the chapel and other religious elements would gain more relevance; on other occasions it would be the complementary services that might appeal to the families of the boarders that were highlighted—the dorms, bathrooms, refectory, kitchens, gardens, play areas; or maybe the historical features of the building or buildings. However, this initial norm had two distinguishing features that would, with time, be corrected in some cases: the absence or near absence of the classrooms, the students and the teachers. There are no classrooms, and if there are, they are generally empty, and there are no teachers or pupils, other than a handful if the latter and in the recreational areas and gardens.

Regardless of the content, one should not discard the influence of the recently arrived cinematograph and what was presented as “a type of animated photographs that creates new narrative norms in the scenes which (...) are translated into the format of the postcard booklet” (Riego, 1997, p. 37). It is a format that is closely “related to the idea of cinematographic sequence. It was a kind of visual tour of a specific area based on individual shots that make up the whole” (Riego, 2011, p. 11). And, of course, there was also the new way of looking at things that the railways were providing. In the words of Manuela Alonso (1997, pp. 74-75), when referring to the postcard booklets on Santander, “the booklet works as if it were a railway line. The passenger sees the main sights of Santander go by: from the station where he arrives, to the next station, situated in the most touristic part: El Sardinero”.

Similarly, the booklet or wallet of an educational establishment transported the viewer from the outside—the general view of the school or the main façade—through the entrance and hall to the gardens of the same. Then, after being welcomed in the visitors’ room, the visitor was shown the other rooms inside the building, before being taken outside into the park or gardens again. And there the visit ended, as did the narrative of the school which had used images in order to “imaginarily” absorb the viewer during his or her successive contemplations of the postcards.

This order or norm was not always adhered to, though. The nature of the teaching center and the view it sought to offer of itself would affect both the norm and the order. Thus, in two sets of postcards of the schools of “Ave María” in Granada, produced between 1914 and 1921, the order followed constituted a narrative, first on the history of the schools: the sets open with two photographs taken in 1888 and 1889 that show, respectively, the caves where the gypsy students lived and the “carmen” (it seems from the Hebrew “Karmel” for “garden” or the Arab “Karm” for “vineyard”) or building and place to which they were taken, along with the founder figure, Father Manjón, before moving on to the activities performed during a normal school day, from the arrival in the morning to departure in the afternoon, with special attention given to methodology used in teaching some of the subjects—



reading and writing, geography, music, ...—and, obviously, there was an ample presence of pupils and even a teacher. Immersing oneself in the sets means not only journeying through the history of the founding of the school, but also getting a sight of a complete school day. In contrast to the cold, timeless, static and monumental presence of the façades or the impersonal rooms and gardens, we are offered here a historical account that includes human beings. In contrast to the fragmented space of the norm or the booklet, what these collections do is to fragment time, or if you prefer, they offer fragments of space, which as Bachelard (1965, p. 38) puts it, “they preserve compressed time”.

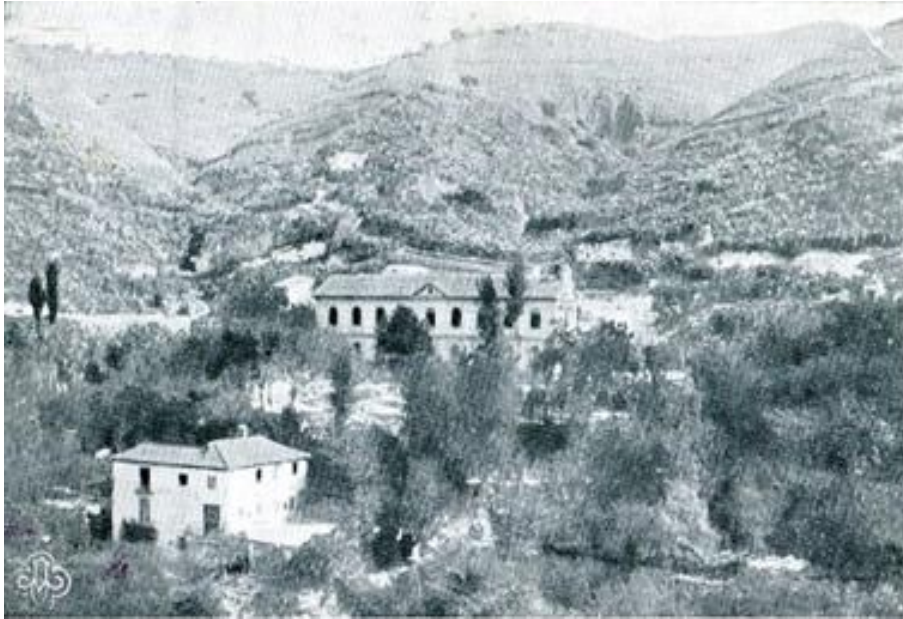


Figure 5. Country schools of the “Ave María” (Granada). “Various ‘Carmens’ were swiftly occupied and schools were built in them”.

Other variations relate to the greater or lesser use made of this advertising resource. The most outstanding case, for the high number (nine) of collections commissioned between 1902 y 1956 and a total of 257 postcards printed, is clearly the “Nuestra Señora de la Bonanova” school in Barcelona of the Brothers of Christian Schools. This was a paradigmatic case of resorting of the image for advertising purposes, taking into consideration the production of some photograph album, with identical purposes, and the abundance of these in the annual reports.



Figure 6. “Nuestra Señora de la Bonanova” school in Barcelona. Large photograph album measuring 29,8 x 23,4 cm. and two booklets of postcards (c. 1930).

While some of the collections met the norm cited, albeit with some variations, others followed completely different criteria. Some focused entirely on a festival of physical education—the issue of 1908 with 35 postcards, on the higher classes in the school—an issue of the 1930s with 17 postcards—with a logical abundance in both cases of pupils and also of families (at the festival). Another issue related to the Natural History Museum. Published in 1920, it contained 20 postcards. In other cases there were high numbers of postcards—55 in the collection of 1914—so giving a far more exhaustive and detailed view of all aspects of the school. Finally, some of the issues were of a lesser nature; that of 1956 had just six postcards which sought to publicize improvements that had been made to the school’s infrastructures, especially in the field of physical education and in particular to the gymnasium, just one year after Barcelona had hosted the II Mediterranean Games, when the famous Spanish gymnast, Joaquín Blume was at the pinnacle of his career and the height of his fame—he would win the individual European Championship the next year (Hill, 2009, 2014).





## CLOSING WORDS

We began by stating that “modernity” is a polysemic, ambiguous and changing concept, whose meaning and scope can only be established in relation to its use in specific contexts, in relation to certain spaces, times, situations and actors. The fact that some educational establishments in the Spain of the early twentieth century—the “golden age” of the postcard—resorted to a commercial product for personal and cultural intercommunication like the picture postcard as a means of presenting themselves to society, as a way of advertising, of creating identities and subjectivities and of building their social imaginarium was firm proof of their being up to date and of the “modern” education that they offered. The commissioning of booklets or wallets of the school or of specific activities carried put in it pointed to a threefold modernity—technological, economic-commercial and sociological cultural. It was a display of modernity and social distinction that targeted a specific audience and families.

That this same modernity was used to attain traditional, safe, stable aims that were held in high esteem (the Catholic education of specific social groups) shows the capacity of the picture postcard to adapt to a specific context and also reveals a combination, in the school world, of traditional ideology and technological, economic and socio-cultural modernity. In other words, it shows the ambiguity of the very concept of modernity and the coexistence of traditional and modern elements in the specific application of that concept, especially when the latter pertain to the external appearance adopted and presented to society. The practice spread and was taken on by more private schools, in the main belonging to Catholic orders and congregations, but also by a few state schools, welfare education institutions and school camps; it offers yet more evidence of the propagandistic and advertising power of the product, and also of the need to make use of it if one wanted to appear “modern”. What would we think today of a school or a cultural or educational institution that did not have its own website?

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**WRITING SYSTEMS AND LITERACY METHODS:  
SCHOOLING MODELS IN WESTERN CURRICULA  
FROM THE SEVENTEENTH TO THE TWENTIETH CENTURY**

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**ABSTRACT**

This contribution sheds light on the interaction between print technology, social literacy and primary school pedagogy from the seventeenth to the twentieth century. The printing press opened up the possibility of a Christian education for all: psalters and catechisms became a vehicle for teaching both religious content and the writing system using the spelling method.

To move beyond this limited Christian literacy combining reading and memorization, and enable learners to read any text directly, textbooks separated the process into two stages: training beginners first to decipher, using the spelling method, and then to read different kinds of texts (informative, moral, civic). As many beginners failed at decoding, all subsequent “innovations” (word method, sentence method, look-say method, phonics, etc.) aimed to bridge the gap produced by this separation. This article will show how this common objective has been realized to varying degrees in different countries, especially in France and the United States (based on education policy, national language, teacher training, textbook publishing, etc).

**KEY WORDS**

Literacy; Primers; Reading method; Education policy; Teacher training.



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# Writing Systems and Literacy Methods: Schooling Models in Western Curricula from the Seventeenth to the Twentieth Century

*Anne-Marie Chartier*

## INTRODUCTION: LEARNING TO READ IN SCHOOL, A COMPLICATED HISTORY

Numerous studies have been devoted to the history of writing. Historians were at first perplexed by the various forms and symbolic meanings of the signs they had to understand, such as cuneiforms, hieroglyphs, and alphabets (Robinson, 1995). They have also described the relationship between writing tools, writing materials and the writing itself: characters carved in wood, stone, or on clay tablets; writings on papyrus, parchment, rag paper or wood-pulp paper, handwritten with a reed, a quill pen, a metal pen, or a pencil, or typed on a keyboard; words printed on paper with a press, a typewriter, or a printer; and keyboard strokes as ordered characters across a screen (Breton-Gravereau & Thibault, 1998).

In 1454, Gutenberg and his press began a new era in Western countries (Eisenstein, 1983; Martin & Chartier, 1983, 1986). This technological innovation, which vastly multiplied the number of potential readers, produced unforeseeable social, political and religious effects. Indeed, the massive distribution of books, pamphlets, pictures and various other printed texts fueled religious conflicts, spurred the rise of vernacular languages, and expanded the reception areas for printed texts. It simultaneously changed the course of the history of literacy (with the beginning of mass literacy in Europe), the history of schools (necessary to provide basic religious instruction for boys and girls) and the history of education (as the goals of social, professional and religious education evolved along with the new tools).

Yet it was only in the 1980's that historians began to study the qualitative impact of technological innovations in writing on the reception of texts, that is to say on reading itself. We always knew that to be a reader was not an evenly shared cultural competence. This skill had slowly trickled down from the top to the bottom of the social scale, spreading from cities to the countryside, and had been mastered earlier by men than by women (Furet & Ozouf, 1977; Graff, 1981; Magalhães, 1994; Viñao, 1999). However, like anthropologists, psychologists and



pedagogues, historians had long assumed that a person who had mastered the rules of the alphabetical language “could read”; that is to say, could read anything (whether a Latin discourse or news on a screen). This immutable representation of reading has been questioned by recent research focused not on the production and dissemination of written texts, but on how texts were received by readers (Cavallo & Chartier, 1996). “Reading” was not a stable skill in time, it also had a history.

This is why it is not surprising that the history of reading as taught in school has not had time to incorporate these recent research trends. The history of the evolution of teaching methods traditionally referred to innovative pioneers: Comenius, La Salle, Locke, Pestalozzi, Lancaster, Montessori, Decroly, and Freinet, who transformed their experience working with children into comprehensive education projects that broke with the habits of their time. All these great educators were authors who published accounts of their experiments, criticized existing teaching methods, and justified their approaches theoretically, in written prescriptions. The history of pedagogy began by tracing the evolution of their educational ideas and showing the novelty of their outlooks. The innovations they had proposed for teaching reading mattered less than their general goals and their conceptions of the educator-student relationship. In contrast, the history of the teaching of reading focuses on empirical progress (Avanzini, 1981; Benton Smith, 1934; Guillaume, 1887).

Teachers working with beginning readers have sought to solve practical problems. They have used, modified, and improved upon the tools available to them. These anonymous “discoveries” accumulated over time, leading to the widely shared opinion that pedagogical practices necessarily progress throughout history. As James Guillaume wrote in his article on “Reading” in Ferdinand Buisson’s famous *Dictionnaire de Pédagogie* (1887):

From this picture of progress over three centuries in this area, which need not be formulated into a body of doctrine, teaching will flow naturally in the directions to be given to the teachers of today on this important topic. (p. 1535)

For contemporaries, the history of innovation stemmed both from the new knowledge (on children, language and learning), the development of tools (textbooks, teaching materials) and the political will that supported education, and from teacher training. Thus educational innovations appeared as “technical” inventions, ideologically neutral, since all were designed to enable more children to learn to read better and better, more and more quickly. The same belief comes through in Nila Banton Smith’s pioneering study of the United States in 1934.



Nevertheless, for anyone familiar with the recent didactics of reading, such descriptions of “old ways of teaching” seem very surprising. The old methods appear to be based on absurd principles, illogical procedures, and often, to be aimed at preventing children from learning rather than helping them, which is difficult to believe. For example, why did children (both Catholic and Protestant) in earlier times learn to read prayers they already knew by heart, as if reading and reciting were the same thing? Was it possible to read other texts independently with this method? Why, then, did all students, whether princes’ sons or farmers’ daughters, have to learn to spell every word, letter by letter and syllable by syllable, before reading, which was “the ordinary way” (Monaghan, 2005) for almost all teachers, in all European languages? And what happened at school to explain how this “spelling method” (in French, *épellation*; in Italian, *compitazione*; in Spanish, *deletreo*; in Portuguese, *soletração*), used for centuries, disappeared within two generations before 1900? Why did one need to be able to read before starting to learn to write and count? And why did reading silently to oneself, a common practice since the late Middle Ages, become an explicit objective in primary school so late (in the 1960s and 70s) in Europe?

But the most puzzling issue has to do with the “skill of reading” itself, and with its collective representation. In the late nineteenth century, teaching reading and writing was considered a tiresome but easy task, that one could entrust to the teacher’s wife, to beginning teachers, or to the elder students in the classroom. Any housewife was presumed capable of teaching her children to read. In the early twenty-first century, despite many years of university studies, new teachers seem not ready to succeed easily in the same task. What changed to explain such a gap? We find the same gap in expectations about the progress of literacy: the optimistic hope expressed in the *Dictionnaire de Pédagogie* (Buisson, 1887, p. 1316) that “the illiterate population, that is to say those who can neither read nor write, will get smaller year by year in France and (...) the nineteenth century will end with a population that can cross that word out of the dictionary” (article “Illettrés”) contrasts sharply with recent findings on the stark reality of adult illiteracy (EFA Report Unesco, 2006). If we want to resolve these puzzles, we have to recognize first that we no longer understand what made the old tools efficient, because we have forgotten both the social goals of literacy in former times, and the usual forms of schooling.

Of course, the connection is neither direct nor immediate between social and school literacy. However, over time the changing “uses of literacy” (Hoggart, 1957) affected school standards and learning modalities. By studying curricula for beginning readers from the Reformation to the present, I have found that technologies of writing seemed to play a fundamental role in those redefinitions.

## MODEL 1: LEARNING TO READ IN THE TIME OF PRAYERS AND CATECHISM

### AIMS AND STAGES OF LEARNING

Let us recall the aims of teaching reading from early periods to the present. For Luther and Calvin (Cressy, 1980; Gilmond, 1996; Strauss, 1981), lay people, like clerics, had to read the translated Scriptures with their own eyes; that is, to read, not only listen. As Luther wrote, nothing should prevent believers from having direct access to the Scriptures, whatever their sex or age, “whether it be a poor maid or a nine year old child”<sup>1</sup>. The Council of Trent advised that early Catholic catechisms should be read “by the letter” to assure that no mistakes were made. As Jacques de Batencourt wrote: “It is much easier to instruct a child [in religion] when he knows how to read”, because “books are like perpetual teachers to those who can read them”<sup>2</sup>. The goal of reading was obviously to make it easier to get a Christian education, which implied three things: first, intensive memorization of a religious corpus of texts including prayers, hymns for liturgical ceremonies, and the contents of catechisms; second, the practice of collective reading, because one who reads by himself is in great danger of error and maybe heresy; and third, the skill of reading without writing, because the art of writing, whether linked with Latin humanities or with commercial accounts, dealt with a social and cultural universe far from ordinary people.

If those were the goals, what were the means? (Chartier, 2007; Chartier, Compère & Julia, 1976; Hébrard, 1988; Roggero, 1999; Viñao, 1999). The most familiar and widespread model of instruction in Europe was the training of young clerks, as a result of both the secular and traditional omnipresence of the church. Even before they learned rudimentary skills, like recognition of letters, syllables, and words, novices first memorized the 150 psalms between daily religious services (the whole psalter was regularly recited each week). The novices also were trained to read Latin while collectively memorizing liturgical texts, aided by plainchant that articulated each syllable, even before they understood the texts word for word. Literacy in non-clerics followed the same means<sup>3</sup> but for lack of daily services, the corpus of texts to learn by

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1 This “direct access” was not through individual reading. Luther did not encourage people or children to read alone but with the community. Martin Luther, M.L.O., IX, ed. Labor et Fides, Genève, p. 111.

2 This frequently cited sentence is from *L'Escole Paroissiale ou la manière de bien instruire les enfants*, Paris, Pierre Targe, 1654, p. 233. The anonymous author, Jacques de Batencourt, is a Parisian priest of the parish of Saint-Nicolas du Chardonnet in the Latin Quarter.

3 Egil Johansson has shown the importance of the numerous hymnbooks in Swedish domestic life, especially for women: “Women and the tradition of reading around 1700. Examples from Sweden and Germany”, in *Women and Literacy Yesterday, Today and Tomorrow, Symposium for Study of Education in Developing Countries*, Stockholm, June 1989, Stockholm: Svenska Unescorådets Skriftserie, Nr 1/1992, pp. 77–94.





heart was reduced to regular prayers and hymns, according to the Catholic or Reformed confession. In Catholic countries, the Lord's Prayer, the Hail Marys, the Creed, and the Confiteor were learned in Latin (and later in Latin and the vernacular). But what were the first tools to help children to read?

#### BATTLEDORES, PSALTERS (PRIMERS) AND CHRISTIAN INSTRUCTIONS (READERS)

Three main teaching tools could be found throughout Europe and the American colonies (Castañeda, 2004; Monaghan, 2005), or nearly: hornbooks (in Italy *carta* or *tavola*; in France, *charte*; *carte*, *palette* or *tablette*; in England, *hornbook*, or *battledore*), ABC's (*salterio*, *Instructions chrétiennes*, *primer*, *Crisscross*) and readers (*Donatello*, *Prayer Books*, *Books of Hours*, *Civilités*, *Catones*). A late English engraving dating from 1622 shows how the first of these, the horn-book, was used in tutoring (Benton Smith, 1986). A young child is holding the handle of a wooden board in his left hand, while in his right hand he is holding a pin which he uses to point out the letters he is naming or maybe his tutor is naming. The tutor is looking over the shoulders of the child standing between his knees. This tool already existed in the Middle Ages. From the sixteenth century onwards, the alphabet was no longer written (and later printed) in columns but in two lines. The first one always began with a cross<sup>4</sup> and consisted of the alphabet in small letters, and the second line, in capital letters. The Gothic fonts were gradually replaced by new Roman or Italic ones. The list of vowels came below the alphabet, sometimes but not always followed by the list of consonants and a few examples of syllables set in columns for instance A, E, I, O, U associated with B, C, and D. Finally, there was a prayer formula (the sign of the Cross and a psalm verse) and/or a "longer text", like the Pater Noster in Latin or in the vernacular depending on the country and the denomination.

The second teaching tool, the ABC, was a very cheap booklet, sometimes illustrated with wood engravings. Whereas the hornbook often belonged to the family, the ABC was the first and sometimes the only schoolbook. It was called psalter more often than ABC or primer. But unlike the psalter printed for religious use only, the school primer included an alphabet and a table of syllables, as in the hornbook: the Cross, the alphabet in upper-case and lower-case letters and a list of syllables which presented the "consonant-vowel" and "vowel-consonant" combinations. It took one or two pages. Primers usually gave only two-letter syllables, but in more elaborate primers that were later copied in popular versions, three- or even four-letter syllables

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4 Children had to make the sign of the Cross before reading letters as well as prayers. Hence the name of Santa Croce, Croix-de-par-Dieu or Crisscross [Christ's cross] given to ABC's in Italy, France or England.



could be found. Then there were the prayers: the Lord's Prayer and the Creed in Latin or the vernacular, the Ten Commandments, and the Ave Maria in Catholic countries. The prayers were printed in separated syllables (emphasized with lines, dashes, or spaces) and in large letters on the first pages. The other prayers included the Confiteor, the seven psalms of Penance, and various religious hymns depending on the denomination (Hébrard, 1988; Monaghan, 2005; Roggero, 1999; Viñao, 2000).

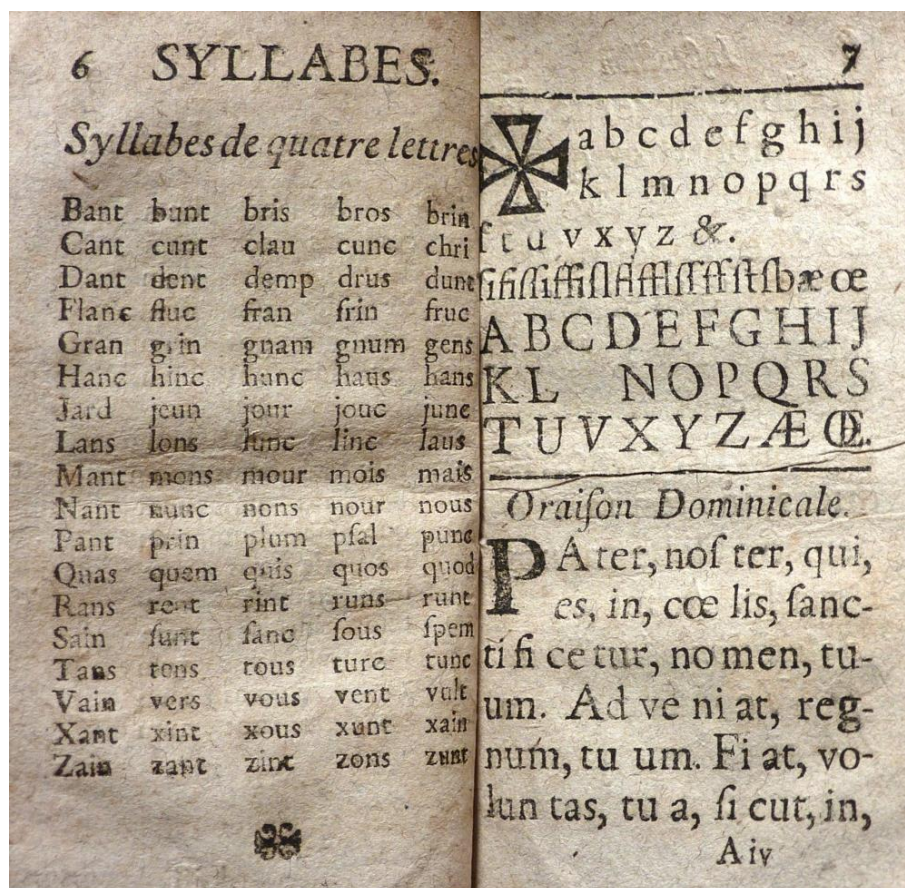


Figure 1. Le Gros ABC.

The third type of book introduced the pupils to longer texts. The opposition between primers and readers, still in use today in England and United States, reflects the difference between the two stages. The selected texts were not written especially for children. They were shortened versions of well-known texts. In Italy, the first reader imposed by tradition was the Donatello, a shortened Latin grammar. The other texts were used in the various religious services: Veni creator and the Vespers of the Virgin, translations of the Gospels and Psalms. All those texts were part of the common services in the community.



The psalter sometimes finished by a short catechism (in vernacular) where children might find a list of the truths that should be remembered (by questions and answers). The *Civilités*<sup>5</sup> which appeared during the Renaissance and dealt with good manners, were adapted in short versions for children. Printed in “civilité types” imitating cursive writing, for the Christian School of J-B de La Salle (Jimenes, 2011) they helped children to get used to reading manuscripts. They were the only booklets dealing with secular subjects.

#### THE READING MODEL: MEMORIZE TO LEARN AND UNDERSTAND

Today it is difficult to understand how it was possible to learn to read with such materials. All becomes clearer if we keep in mind that learning to read was not, at the beginning, about understanding the meaning of an unknown text. The purpose of the spelling method was to show how a text one knew perfectly well orally was written, and how letters “transcoded” the sounds of a language (either Latin or the vernacular). As soon as they had learned the names of the letters of both alphabets, beginning readers could practice on their own by reciting the prayer *sotto voce* as they progressed, breaking it down into syllables. They had to coordinate their eyes (on the letters that formed the syllable), their finger (which followed the line), and their voice (which pronounced the word, syllable by syllable), without making any errors. The catechism was also memorized in a question-and-response conversation format (young students listened to older students' recitations) well before students had reviewed the text on the printed page. Once a student was able to spell and pronounce the *Pater Noster* syllable by syllable (P-a Pa, t-e-r, ter, Pa-ter), he had to say it word by word, and finally sentence by sentence. He would do the same for other prayers. Then he would try to read unknown texts that were written in the same style (psalms, hymns, canticles). This is comparable to the way chorists today learn to read musical scores<sup>6</sup>: many are able to read the notes on a score only if they have memorized the melody and know it orally by heart, as did the young readers of psalters in the seventeenth century (Bisaro, 2010). The same technique could be used with non-religious texts that had been learned by heart, such as fables or songs. Indeed, some people did manage to teach themselves to read in this way, as shown in the well-known case of Valentin Jamerey-Duval<sup>7</sup> (Hébrard, 1985).

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5 Erasmus wrote in 1530 *De Civilitate morum puerum*, translated or imitated in many vernacular versions, which had a great success in schools from the seventeenth to the nineteenth century.

6 Xavier Bisaro recalls that the schoolmaster was also the “cantor” of the village and he learned the same method to teach Latin and plainchant, sung by his students with him during religious services.

7 Valentin Jamerey-Duval (1695–1775) was a young shepherd who learned to read via the Aesop's Fables he knew by heart. He finished his life as the librarian of the Duke of Lorraine. He recounts his life story in *Mémoires. Enfance et éducation d'un paysan au XVIIIe siècle*, Présentation par J-M Goulemot, Paris : Le Sycomore, 1981.

Many readers were never able to read any “new” text alone, but they knew enough to respond to questions in catechism and to be allowed to take communion: religious education did not demand any more than that. Exams to receive the right to take First Communion in Catholic countries, or to be confirmed in Protestant countries, existed in all of Europe. The tests were more or less difficult depending on the expectations of local clergy: indeed, some children were “held back” to repeat a year of schooling (Johansson, 1981; Julia, 1995). The tests could be considered the “PISA tests of the seventeenth century”, since they evaluated the literacy of the time, which encompassed both scriptural (contained in Christian dogma) and procedural (how to recite and re-read a known text) knowledge. They were, essentially, the roots of later tests (Caspard, 2002). The difference between the age of communion (eleven or twelve years) and that of confirmation (fourteen or fifteen years) is three years. Those years of supplementary instruction are sufficient to explain the higher level of education in Northern Europe than in the Catholic South.

For the students who were able to read printed texts, further training was necessary to read manuscripts. These had secular content, but like prayers, they are texts of commitment (e.g. promises, testimonials, contracts, sales, purchasing, account statements, debt acknowledgment, loans, wills, testaments). Urban schools for the people taught the limited number of students able to read their catechism alone with ease how to read and write in cursive at the same time as they learned the arithmetic necessary to maintain accounts. This made the Brotherhood of Christian schools founded by La Salle very successful. They taught students to read, then write, then count (La Salle, 1706), but this form of reading, writing, and arithmetic (the Three R's) had little in common with the reading, writing, and arithmetic of the Third Republic in 1880. What made their definition “knowing how to read” so far removed from our understanding of the expression today?

## MODEL 2: THE “REVOLUTION” AROUND 1750, FROM INTENSIVE TO EXTENSIVE READING

### TWO MODELS OF READING IN CONFLICT: A PERFORMATIVE ACT VS. A RECEPTIVE STATE

Reading was not yet “how to deal with new information”. For a long time, reading consisted of reviewing old knowledge, first acquired orally, and then rememorized from a book, as one would rehearse a piece of music with a score. At a time when “reading was learning”, this sort of reading, far from being



reserved for children or people with little education, was the typical way in which medieval clerks read (Carruthers, 1990). Literal memory was considered the best way to master the meaning of a text (Jacob, 2003). Commentaries and interpretations were reserved for literate clerks, who were expert readers (Grafton, 1991, 1997). This “read-recite” literacy was the basis for both Protestant and Catholic catechism, and reading out loud or *sotto voce*, slowly and intensively, had a high performative value, just like that of all prayers. A person who reads a psalm is not trying to “understand” a text to comment on it or discuss it; on the contrary, the psalm he enunciates speaks for him, expressing on his behalf the praise, supplications, promise and forgiveness. To enunciate the text with confidence and respect was all that was needed.

This is why fiction, novels, pamphlets, and libels were seen as “bad and dangerous texts”: the mouth that pronounced words and sentences could not be dissociated from their characterization as lies, blasphemy, or shameful obscenity. If the reader was always the mouthpiece of the written message (religious or not), he/she could be contaminated by any “bad” text. One can understand why religious and political authorities of the period so dreaded the influence of heretical or subversive texts, including the emotional draw of fiction (particularly sentimental or libertine novels), which were considered seductive lies. They did not imagine any style of reading other than that literal adhesion to text. Collective reading shielded readers against the potential dangers of solitary reading (Hall, 2011). Group recitations united a reader with the community, just as in a choral chant. The fervor of contemporary ritual celebrations shows that this “practical force” has not entirely disappeared.

This concept of reading has obviously become irrelevant, now that readers want to keep up with the latest texts published, which “engage only their authors”, all to arouse the insatiable curiosity of readers. This type of reading became the norm with the success of gazettes and novels over the course of the eighteenth century. Faced with this new type of reading, which was avid, rapid, and solitary, contemporaries spoke of a “revolution in reading” (Wittmann, 1999). The model of reading then turned into our modern definition: to be a reader is to be in a receptive state. The strength attributed to a text now lay in the act of the person who uttered it to a third party and reading acquired the dangerous power to trigger the full range of existing emotions, making it very attractive. “Instead of being a method of educating toward independence, in the sense intended by Immanuel Kant in his definition of Enlightenment, [reading novels] served merely in order to kill time and maintain a condition of eternal dependancy” (Wittmann, 1999, p. 301)<sup>8</sup>. The reader discovers unknown stories, in new worlds far from himself, for better or for worse (Flint, 1993; Lyons, 1987).

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8 According to the philosopher J. G. Fichte, the “reading mania” is a “narcotic”.

## HOW TO TEACH EXTENSIVE READING?

What were the consequences for young readers of this new way of learning? In the late eighteenth century, to prepare their privileged students to read texts (which were as numerous as they were ephemeral), private tutors abandoned memorized prayers. They would force their beginning students to memorize all syllabic combinations, without relying on a significant text. The key to reading any unknown text was to master the whole code of graphemic to phonetic sign relationships. Proficiency at decoding required connecting the written signs, words and phrases to a previously mastered oral language (French, in this case): it was like learning to sight-read a score without any music. Pestalozzi gives an idea of the massive and vain effort to 'rationalize' learning of the grapheme-phonetic code:

I began to bawl the ABC from morning to night (...) I accumulated without tired syllabic combinations; I filled entire books of syllables and number series; I sought by all means to simplify as much as possible the elements of spelling. (Guillaume, 1887, p. 2308)<sup>9</sup>

Rousseau rose up against the superhuman demands put on children to learn to read and the consequent failure rates when he wrote: "Reading is the scourge of childhood". His hero, Emile, would learn to read when he wanted to learn. He would succeed in learning to read, because he had the privilege of an attentive tutor, but would he have learned to read in a classroom community? Between 1750 and 1850, schoolmasters found themselves torn between the modest pedagogy of intensive religious readings, as practiced by the brethren in Christian schools with well-established methods for group teaching, and the excessive ambition of private tutors who encouraged the memorization of all syllables as a precondition for the modern notion of reading extensively. Many rural children, who did not even speak French, were unable to memorize the charts of syllables and remained illiterate. Others who managed to learn to read and recite their lessons (as in catechism) left school knowing "only how to read". In 1860, according to the Minister of Public Instruction, Victor Duruy, 40% of students left school "illiterate or almost".

Subsequent generations of teachers tried to invent procedures to reduce the gap between the mastering of graphical code (deciphering) and the ability

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9 Pestalozzi's method was to have beginners (5–8 years) memorize five different combinations for each letter of the alphabet, successively joining the five vowels with all consonants, forward and backward (ab, ba, id, di, of, fo, ug, gu, etc). Then came combinations of two consonants and a vowel (bud, dub, bic, cib, gaf, fag), and finally he would spell long and difficult words. Pestalozzi later rejected the method as absurd and became a follower of Rousseau.



to understand texts (reading). So, the pedagogy of reading followed two paths: first, accelerating the mastery of graphic code, and second, inventing texts closer to what children were capable of understanding (Vincent, 1989). French beginners' textbooks<sup>10</sup> help us understand how the first of these pedagogical aims evolved. Between 1830 and 1880, the didactic and editorial characteristics of the texts increasingly reflected new scholarly objectives<sup>11</sup>. By the end of the period (1880-1900), the syllabic method had become the standard. Skill development happened over the course of a year (30-40 weeks), each lesson was one page long and presented the letter sound to be learned, with exercises that featured the syllables studied, and short sentences that mixed new and old lessons. The reading material was only to practice reading words or short phrases that used syllables that had already been learned or were currently being studied. Nothing like this had existed between 1800 and 1850, as we can see in a French and an American example.

The *Alphabet and First Reader* was widely distributed by the Ministry in 1832, spreading an idea of the kind of results ministerial authorities hoped schools would produce<sup>12</sup>. The book is written in the tradition of "rational" (*raisonné*) instruction, designed for novice learners (adults or children). It presents vowels, consonants, and the alphabet in three different typographies, with twelve pages of syllables and four pages of "exceptions" (muted or variable letters). The underlying idea is that the student, who has "studied" all of the relationships between letters and sounds and knows the graphic rules of writing (like capitalization, punctuation, and abbreviations), has acquired the principles that are the key to reading. The student is therefore ready to read any text: the second part (*Premier livre de lecture*) that follows the first (*Alphabet*) is a small encyclopedia that examines one theme per page (1. Children, 15. Fruits and Vegetables, 26. Calculations, 68. Volcanoes, etc.). In reading and re-reading the texts together with the teacher, the student will learn only that which school gives them: common ethics and science.

A comparison with the *Blue Back Speller*, the famous primer used in the United States, shows that the order Webster chose was exactly the same (Chartier, 2013). First came all the exercises involving "coding and decoding" (lists of syllables, from simple to complex; words of two, three, four

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10 A synthesis of this research was presented in *L'école et la lecture obligatoire [School and Mandatory Reading]* Paris: Retz, 2007, 2014 (chapter 5). See also, *Teaching Reading: A Historical Approach*, In Nunes T. & Bryant P. (Eds.) (2004), *The Handbook of Children's Literacy*, Kluwer Academic Publishers, Dordrecht, Boston, pp. 511-538 and "The Teaching of Literacy Skills in Western Europe An Historical Perspective", In Olson D. & Torrance N. (Eds.) (2009), *The Cambridge Handbook of Literacy*, Cambridge University Press, Cambridge, pp. 449-467. I analyzed seven textbooks dating from before 1830, 20 textbooks from the period of 1830-1848, 130 from the period of 1850-1880, on which I focused, and 40 textbooks from 1880-1900.

11 The INRP library (now housed in the Bibliothèque Diderot at the ENS-Lyon) holds a particularly rich resource for the years 1840-1880, having inherited the private collection of General Inspector Rapet.

12 Written by Ambroise Rendu, councilor to the minister and the editor Louis Hachette, a million copies were purchased so they could be freely distributed to "indigent" students, and sold at a very low price to others (for the equivalent of one or two Euros).

syllables; and short sentences) and second, a number of instructive and moral texts. Textbooks at the time ranged from 20 to 200 pages. Sometimes they featured only a few tables of syllables combining vowels and consonants, but sometimes the tables spread over many pages, followed by long lists of words classified by length (one, two, or three syllables, separated by a hyphen), and then, in a second part, long texts on instructive, moral and civic texts.

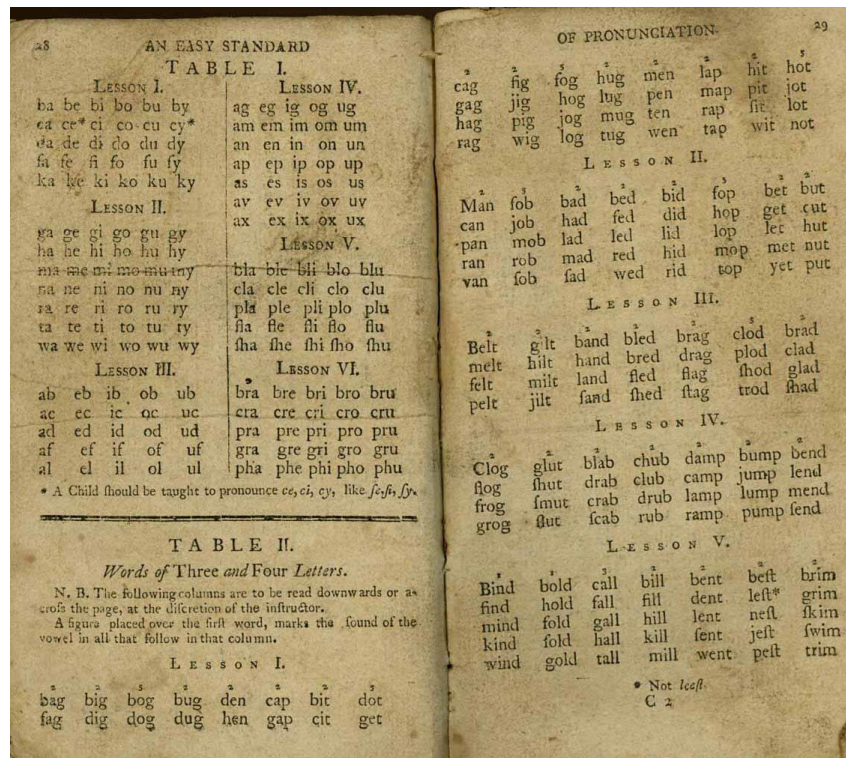


Figure 2. Webster's Blue Back Speller.

## DEBATES ABOUT THE SPELLING METHOD BEFORE 1860

There is abundant evidence of pupils failing at school during the period: many "loitered in vain on the threshold of reading", which means that they never got beyond studying the syllable charts. Even though a seventeenth-century primary school student seemed capable of working on his or her own, as we have seen it was impossible for nineteenth-century grade school students to study independently. As General Inspector Rapet wrote in 1860<sup>13</sup>:

13 *Journal des Instituteurs* 34, 19 August 1860, 118, 119.





What can we make of a poor child who does not understand how to read or write? There is no way to work with him. To pretend that one will succeed in teaching him by putting his reader in his hands and telling him to study is a delusion, something even the most enlightened and experienced teachers are unable to achieve. He would be able to hold his reader in his hands, wiggle it around, gnaw on it, but he will never study it, because that is impossible for him. To study reading, when he has not achieved anything close to the appropriate reading level, it is absolutely necessary to have the assistance of a teacher. (pp. 118-119)

In the United States, the solution was found by the editors of McGuffey's primers<sup>14</sup>: to use regular monosyllabic words (ox, ax, pup, cat, dog) and images to connect meaning and word; any pupil could then pronounce the word. The typical sentences produced by these very strong lexical constraints followed this pattern: "Is it an ox? It is an ox. It is my ox" (*McGuffey Pictorial Primer*, 1853), or "Can a pup run? Yes, a pup can run. All the pups can run. But a pup can not run as fast as a dog". Those texts transmit no essential values, deal with only what the children already know and are not meant to teach anything else but how to encode and decode written language. In France, illustrated primers were too expensive for schools before the end of the nineteenth century. So, Peigné's way (137 editions between 1830 and 1898) was considered as the best: in the daily lesson, students discovered a new letter, made new syllables with it, and immediately, words combining new syllables with others already studied (*ma-ri, mû-ri, mu-ni*). Each sequence ended with summaries of what had been learned. As soon as possible, Peigné made students read short sentences of simple and regular words (*Médor a mordu la tartine ; l'activité mène à la fortune*: one sound / one letter) which were "meant to express something", he said, that grabs the attention and relieves the memory. The word "lesson" referred to a page in the book, content to be learned, and a short amount of time working as a group, guided by the teacher. In thirty or forty lessons, all of the sounds were heard, the sentences in the text had been read in sequence, and the year was complete. One can imagine how much it must have eased the burden of young teachers to have the year's work planned out entirely in advance.

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14 Between 1836 and 1920, 132 million copies of *The McGuffey Readers* (one book for each level) were bought. (Mathews, 1966, p. 102).



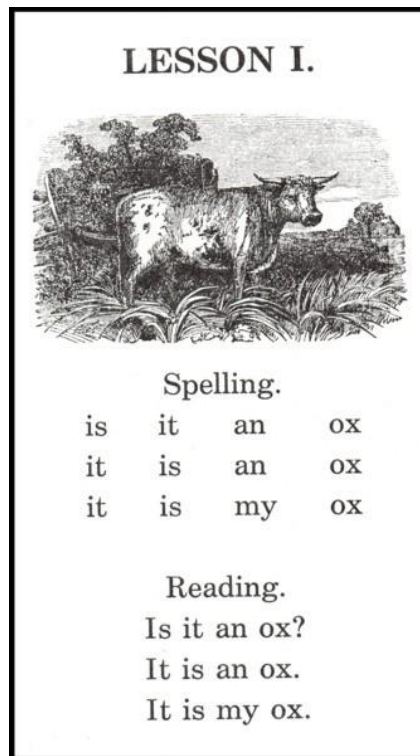


Figure 3. McGuffey Pictorial Primer.

#### THE END OF THE SPELLING METHOD FROM THE 1860s

This evolution in method followed longstanding efforts to speed up syllable reading and the transition from syllables to texts. In 1860, the instructor A. Lefèvre summarized the confusion in the field:

Two processes, spelling and non-spelling, have fought for too long for practitioner approval, because neither of the two have any serious advantages or disadvantages... We unanimously and purposefully criticize the old spelling method for being ineffective at helping students discover the phonetic value of the syllable by enunciating the letters. (p. 6)

For reading without spelling, one must memorize syllables, but “*our language has them by the thousands*”. However, from the 1860s on, “non-spelling methods” became “practical” and “speedy”: all were methods that featured simultaneous reading and writing, with the help of new tools.

Schools could be equipped with slates, chalk, and notebooks (wood-pulp paper was ten times less expensive than rags paper) and wear-resistant



metal quills (to replace goose quills, which were difficult for children under the age of eight or nine to handle). These materials permitted beginners to get an early start learning writing, and would keep them quietly occupied. As progress in writing (which begins by tracing i, u, n, and m, because those are the easiest letters to draw) has nothing to do with progress in reading comprehension (which often begins with the letters *a* and *b* or *p*, too difficult for beginners to trace), these two learning tracks remained separate.

Everything changed when schoolteachers had the idea of supporting learning to read with learning to write. In reproducing lines of letters (n, i), then lines of syllables (ni), the students “learned them by heart”. When the student saw *mu-ni* or *pu-ni*, he or she read *ni* without spelling it: the syllabic method was born. As the adjective “syllabic” indicates, this method makes students pronounce syllables directly and does away with sounding out the letters individually. The *Cuissart Method*<sup>15</sup>, triumphant in 1881, was used widely for forty years. At the top of each page there is a drawing of, for example, an Ile (Island) for I or an Usine (Factory) for U, flanked by the letter I or U; then a line of syllables followed by words illustrating the “letter sound” in both cursive and print. This is followed by a short sentence in print and cursive. Each lesson concludes with a model letter in cursive to be copied in a student's notebook. Thus while learning to write, students learned to read much more quickly. An age-old order disappeared, the alphabetical order, replaced by a new sequential arrangement, based on a progression reflecting many criteria about writing (how easy or difficult letters are to draw) and reading (relationship between letters and sounds, regularity, encoding of sounds by one or several letters, etc.). We can observe the same debates, and with time lags, the same link between reading and writing in primers in Spanish, Italian and Portuguese<sup>16</sup>. In Chile, Claudio Matte wrote a new national method in 1884, *Nuevo Método (fonético, analítico-sintético) para la enseñanza simultánea de la lectura i escritura, compuesto para las escuelas de la República de Chile*. The model was German and the books were printed in Leipzig.

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15 *Méthode Cuissart. Enseignement pratique et simultané de la lecture, de l'écriture et de l'orthographe*, by E. Cuissart, 1er livret. *Étude des lettres et de leurs combinaisons simples*, 1882. This illustrated method book will serve as a prototype for the manuals created during 1900–1925 and it was republished repeatedly through 1938.

16 In *Histoire de l'éducation*, 138, 2013, see Mayorca, Martínez-Moctezuma, Roggero, Magalhães, Frade.

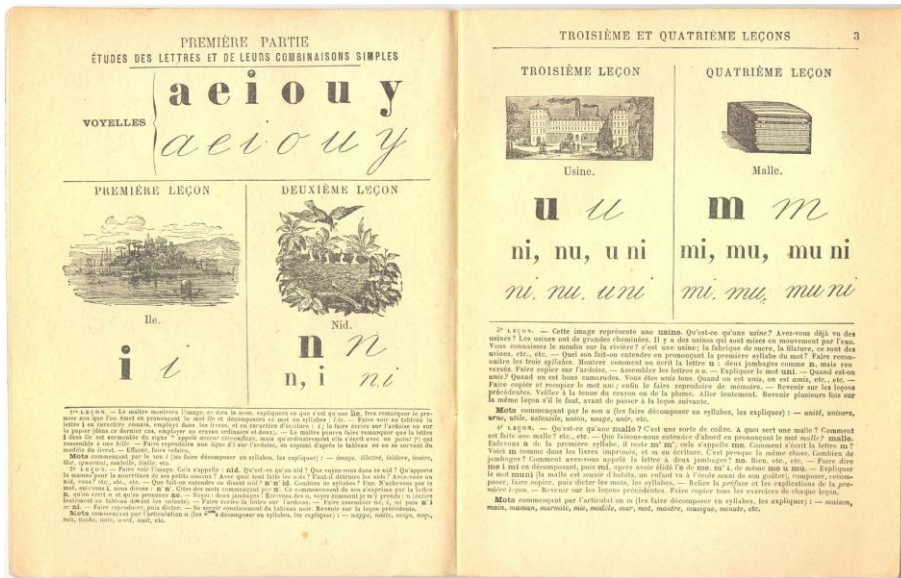


Figure 4. Méthode Cuissart.

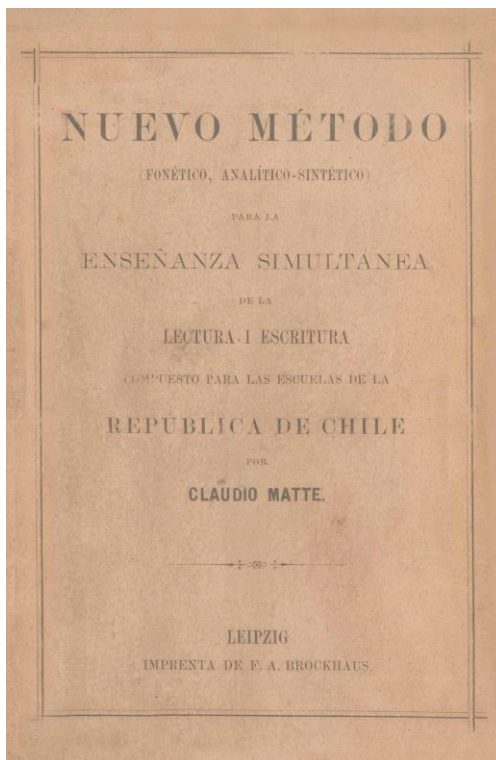


Figure 5. Matte Nuevo Método.



### MODEL 3: FROM READING WORDS TO INTERPRETING TEXTUAL SITUATIONS

#### TECHNICAL TOOLS AND THE NEW RELATIONSHIP TO “MODERN” READING

What conclusions can we draw about changing models for teaching reading in the nineteenth century? Our first finding concerns the link between reading didactics and technical progress in writing. New, easy-to-use writing tools enabled beginners to copy models by themselves, whereas previously they depended on guided oral exercises. Copying cursive letters trained the hand and helped students memorize letter combinations that were previously memorized orally. Thus, spelling remained important (to write syllables or words, it is necessary to proceed letter by letter), but it disappeared from reading lessons and was replaced by reading exercises based on writing exercises. Copied words would then be written from memory during dictations given by the teacher.

The second finding is about the time required for a didactic innovation to come into widespread use. In this case, writing resolved the principal difficulty in teaching a class of learners of varying levels, which explains the method's success. The beginners were now busy and quiet. They behaved in the same way as more advanced classmates, alternating between lessons and exercises, reading and writing. In France in 1886, the first stage of the primary school curriculum, the “cours préparatoire”, devoted exclusively to decoding, became mandatory for younger pupils from six years old (and not seven as before). For teachers, the syllabic method maintained the progressive approach of the older textbooks, but broken down into daily lessons, bringing an entire group of beginning learners through at the same pace.

The third finding is about the link between intelligence and learning speed. In the textbooks of the 1830s, syllable charts never included information about how long they would take to learn: each child went at his own pace (and many remained there). That was no longer the case with the “modern” manuals divided into daily lessons. Teachers had to manage students who kept pace with the lessons and students who didn't. For teachers, a new manual would be judged easy to use if the progression of the lessons was appropriate for the average student, allowing most children to keep up with the lessons. The teachers observed the link between intelligence, speed, and mastery of scholarly learning, which Binet theorized in 1904 in his metric scale of intelligence (*échelle métrique de l'intelligence*). Between, on one end of the spectrum, children with “mental disabilities”



(who would never be able to speak, or who could speak but were unable to learn to read), and on the other, children who could read and write after one year of training, Binet detected children with “learning disabilities” (*anormaux d’école*): those who could learn to decode after a long period of training, but would never be able to read and understand texts autonomously.

With the advent of Binet’s test, reading skills no longer appeared as an artifact of human technology, but became a feature of human normality and the best index of one’s intelligence (Binet, 1973 [1904]). Binet saw a difference of degree and not a difference of kind between natural languages and literacy. The consequence of this rise of intelligence (conceived as a scale) was a stigmatisation of memory (Chartier, 2015) and the old goals of teaching based in memorization, particularly those related to religious model of reading. From 1830 on, memorization was challenged because it allowed students to recite texts “like parrots”, without understanding what they were saying, as one might recite prayers or the catechism. At the time, people no longer saw the connection that Christian literacy had constructed between memory and learning how to read, inherited from the scholastic culture of the Middle Ages and adapted during the Reformation to help people become literate. The aim of the new pedagogy was not to construct a mental memory of texts, but to identify words. And that was the new issue: was identifying words sufficient for understanding texts?

#### WAYS TO IDENTIFY WORDS: THE SYLLABIC METHOD, THE WORD METHOD OR THE WHOLE WORD METHOD

Throughout the nineteenth century, philosophers debated about learning processes. The rationalist approach advocated learning from the parts to the whole, from the simple to the complex, whereas the empiricist approach favored learning analytically, with the simple abstracted from the whole. This debate, which informed all discussions about teaching reading, focused on the status of the word: whether it should be considered as the starting point or as the objective. For those who had supported the spelling or syllabic method, the word was the whole which had to be apprehended from the perception of its components (letters and syllables). But for those who supported the word-method, children should first understand the word as a whole and then proceed to the observation of its elements. Still other educators considered the word as an element of larger units, notably the sentence or the text, and believed children could proceed from the word to the sentence or from the sentence considered as the unit giving meaning to the words (sentence method).



By the end of the century, whether children spoke out names of letters as in the old spelling method or sounds as in the modern spelling method, whether they read syllables (syllabic method) or whole words first (whole-word method), had no impact on the practice of copying. Through writing, “phonological awareness” becomes slowly but permanently connected with “orthographic awareness”, as cognitive psychologists would say to-day. Educators realized that, contrary to what they might have imagined, reading well did not necessarily ensure this link. Due to the lack of regularity in the written code, English, Nord-American and French teachers (more than German, Spanish, Italian or Portuguese teachers) were beginning to worry about students’ spelling ability and not only their reading level<sup>17</sup>. This relationship between writing and learning to read, observed empirically in the United States, has nonetheless had no effect on theoretical conceptions of reading, which is still regarded as a basic skill, independent from writing.

READING IS UNDERSTANDING TEXTUAL SITUATIONS,  
AND NOT SERIES OF WORDS

A second way of teaching prevailed first in the USA, then in England, based on the whole-word method, which does not require any explicit analysis of sounds. With the irregular spelling characteristic of English, systematic learning of correspondences between graphemes and phonemes becomes impossible and discouraging and more children are likely to fail than to succeed. Experiments have shown that a child memorizes whole words very fast so that they can be used from the start of reading. Some oft-cited forerunners in this area are the German pedagogue Gedicke (1753-1804), the French educator Jacotot (1790-1840), and the American Pierce<sup>18</sup> who wrote in 1844: “When they are perfectly familiar with the first words chosen, and the sentence which they compose, select other words, and form other sentences; and so on indefinitely”. He assumed that in the stock of well-known words, children will gradually discover recurring elements which will enable them, by analogy, to read new words without help. It is why the whole word method was also called global method or look-and-say. It leaves the codes out and focuses on units beyond words, i.e. on the understanding of texts.

The primers' obsession with phonology was also questioned by the first scientific research on adult reading processes. Then, psychological and

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17 In 1880, in the USA, Walton observed in pupils' papers 108 different spellings of the word *whose*, 58 for the word *which*, and 208 for the word *scholar*. The French School Inspector Beuvain made similar observations in France in 1873. 77% of children spelled the word *tuyaux* correctly, but the remaining 23% produced 138 different spellings. From those findings, associations of linguists tried (in vain) to impose a simplification of English or French spellings. See Matthews (1966) and Chervel (1989, 2006).

18 Pierce, 1844, On Reading, *American Institute of Instruction*, XIV, quoted by M. Mathews (1966), p. 87.



physiological investigations shifted the emphasis from oral reading to silent reading. Several reports defined expert reading as the individual, silent and quick processing of information. If reading is an ideo-visual process, is it really necessary to spend so much time training children to read aloud? The fluent reader is someone who can “see” directly the meaning of the word in the written form, without any oral medium. It is the way spontaneously chosen by the supporters of the whole word method, which can be called look-and-mean rather than look-and-say. Their choices were confirmed by the very fast progress of children when they began to read short texts. It thus seemed most urgent to create for children simple but interesting texts, where there is something to understand, and not just words to string together: stories involving situations, heroes, action. This is how the story of the Little Red Hen<sup>19</sup> was soon translated all over Europe and published in schoolbooks for beginning readers.

In 1908, when he examined the various methods in competition in schools, Huey (1908)<sup>20</sup> foresaw that the ABC method, still in use in some classes, would soon be shelved and outdated. He talked about the technical progress of the phonic method but concluded that in the near future the look-and-say method would be implemented more. The twentieth century was off to an optimistic start: schooling had become universal and the combination of school policies, pedagogical experiments and scientific discoveries had virtually eliminated illiteracy. They would certainly overcome reading disabilities and, in the short run, children would be able to read texts without suffering the pangs of decoding first.

#### TRAINING CHILDREN TO UNDERSTAND SHORT ILLUSTRATED TEXTS

After the First World War, the first surveys of adult illiteracy soon contradicted this optimism. The Alpha Test, designed for the military, revealed that despite normal schooling, 25% of soldiers and sailors were unable to understand simple newspaper articles, execute instructions or comprehend written communication. On that model, William S. Gray<sup>21</sup>

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19 The story was written especially for young readers, from an old Russian tale. Judson, Harry Pratt and Ida Bender, *Graded Literature Readers, First Book*, Merrill and Co, 1899.

20 Edmond Burke Huey (1870–1913), professor of psychology at the Normal School of Minnesota, and then at the University of Pittsburg, wrote a thesis on eye movements. He met Émile Javal and Alfred Binet in Paris in 1901, and Pierre Janet in 1908 when he directed his research on the mental deficiency. His book on reading enjoyed lasting success in the teacher training centers, where it guaranteed the scientific value of the whole-word method.

21 Under the direction of Thorndike, William S. Gray (1885–1960) wrote one of the first theses assessing the reading performance of children with standardized tests. Professor at the University of Chicago from 1916 to 1945, he proposed measures-equipped performance and objectified approach methods. As an expert for UNESCO he wrote *The Teaching of Reading and Writing, An International Survey*, UNESCO [1956, 1967], which was the benchmark for





created the Scholastic Aptitude Test (SAT), administered for the first time in 1926. His priority was not to introduce literature, even American, to the masses but rather to get everyone to the functional reading level necessary in a society dominated by utilitarian communication. The result, in 1930, was his co-authorship with different authors of primers (W. H. Elson, M. H. Arbuthnot) and illustrators (Zerna Sharp, Keith Ward), of *Dick and Jane*, a very successful textbook series including a pre-reading book, pre-primer, primer and first reader<sup>22</sup>. Students first got to understand the plot via the illustrations: “What happened to Dick? What is Jane doing? What is going to happen? Why?”. Once they understood these situations (through image analysis, discussion of the text image, interpretative assumptions, in a realistic way, based on childhood experiment, not imagination), the teacher had to read short sentences under the image (*Run, run Dick!*), and each student would read again in turn those few written words (monosyllabic and regular) already heard in the previous step. Progressively, they tried to “guess” what was written, aided by images and recognizing whole words they have memorized. As Gray was a behaviorist, he thought it very important to maintain a positive relationship to learning, to enhance success and avoid putting students in a situation of failure (as indicated in the title *Fun with Dick and Jane!*). He therefore recommended that the individual’s pace of learning be respected, so that teachers got used to dividing classes into three groups: fast, medium and slow. The comprehensive method of the *Dick and Jane* series made it possible to start out easy and progress fast so that, aided by their literal memory of texts (as with prayers in earlier times), many children discovered the rules of the graphic/phonic system of English by induction. The model was adapted in Spanish and Portuguese versions, and the “whole-word method” also enjoyed success in Brazil in the 1950s (Frade, 2013).

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literacy campaigns in the Third World. President of the International Reading Association, he was the most famous psychologist of reading in this period.

22 From 1930 to 1973, the publisher Scott–Foresman sold millions of copies in the US, Canada, Australia, etc.

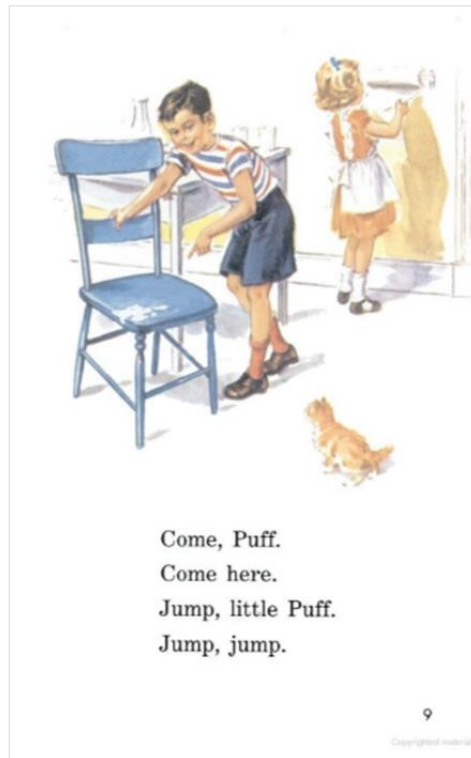


Figure 6. Dick and Jane: images 1 and 2.



Figure 7. O Livro de Lili.



In Europe, the “global method” was also successful, but with a different theoretical basis. The methods for teaching reading were called into question not by the functional illiteracy of adults, which was not discussed before 1970, but because educators discovered children who could not make it past the first stage of the curriculum. The pedagogy developed with success for “deficients” before 1914 by Montessori and Decroly proved capable of undermining the basis of ordinary schools by demonstrating that many activities beyond primer exercises could give meaning to written instructions to do something: for example, acting out written instructions from the teacher or a classmate (like “open the door”, “take a chalk”), reading labels and names so as to be able to store and classify material in the classroom, or reading correspondence between schools to write a collective answer. Why not offer such activities to all children? Taking into consideration what Decroly called “children’s interests” disrupted accepted educational modalities (time use, programs, scoring) and methods of reading and writing. Although Decroly thought of reading as an ideovisual process, the “Decroly Method” did not dissociate reading and writing<sup>23</sup>. Freinet recognized the influence of Decroly’s conception of reading on his own, but to further the emancipatory aims of his “proletarian” pedagogical project, he chose to focus on writing rather than reading (free writing, letters between classes, daily printing of texts created by pupils etc).

In Europe, textbooks for beginning readers began to introduce color illustrations representing children in action only after World War II. In France, the first lessons required a “global memory” of a few words, before returning quickly to phonic/syllabic analysis. Writing in cursive with the reading lesson helped pupils work on the correspondence between letters and sounds (*Rémi et Colette*, 1954, *Daniel et Valérie*, 1964). Teachers seemed satisfied with such methods until the 1960s, but this was no longer the case with the introduction of secondary education for all: the level of reading was not advanced enough to enable teenagers to read alone and quickly in all secondary school subjects. The high proportion of students failing at school was attributed to the archaism of syllabic method (Chartier, 2013; Chartier & Hébrard, 1989, 1990). At the same time, in the US, the look-say method had been called into question for the same reasons (Chall, 1967; Flesh, 1955), but the causes of failure were not the same. In France, students were reading aloud too slowly, often awkwardly, and in trying to pronounce words, they neglected to pay sufficient attention to the meaning of the whole text. Meanwhile, American and

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23 Amélie Hamaide (1888–1970) wrote in 1922 *La Méthode Decroly* (Delachaux-Niestlé), translated into 13 languages. Daily exercises included writing of read words and reading of written words (“écrire les mots lus”, “lire les mots écrits”) as well as the daily training in copying (“mécánization: copy a sentence every day”). She described the “global approach” of reading-writing, but the term “global method” appears only in the 3rd edition, prefaced by the Swiss educator Roger Cousinet. The “global method” was the official method in Belgium from 1936 to 1957.

English students, using reduced vocabulary textbooks, made many interpretative errors by trying to “guess” the meaning of the texts, and as a result, phonics were reintroduced in the new primers.



Figure 8. Daniel et Valérie, 1964.

But in all countries, the failure of earlier methods could be attributed to theoretical or practical “errors” that scientific knowledge could correct. Sociologists had described in detail the selective results of reading codes and content for working-class students (Bernstein, 1971; Bourdieu & Passeron, 1964, 1980). Linguists demanded that all teachers have some knowledge of the graphophonic system of the national languages, as soon as speech sounds and grapheme stood for letters and sounds in textbooks. A number of psycholinguists found the oral language of many children insufficient to start training them to write and argued that reading is an interaction between reader, text and language (the theory of “whole language”—Goodman, 1982; Smith, 1975). According to other psychologists, those teachers who did not recognize the stages of children’s progress in learning to write assigned exercises prematurely without result (Ferreiro & Gomez-Palacio, 1982). According to cognitive psychologists, teachers did not teach, or taught too little, to deal with formal signs of writing that contribute to its meaning as punctuation, syntax, discursive organization (Rieben & Perfetti, 1991; Zagar & Fayol, 1992).



#### MODEL 4: READING IS TREATING INFORMATION IN ANY TYPE OF TEXT

The common idea which proceeds from all of these studies and debates defines “knowing how to read” on a progressive continuum, going from the lowest level of reading ability to the highest. This is the OECD's idea: as soon as writing becomes mandatory in social and economic circles, literacy and illiteracy are judged according to academic norms. The five levels of literacy reflect the five levels of professional qualifications (OECD, 1998), defined by levels of academic achievement<sup>24</sup>. This definition has the clear advantage of being compatible with formal academic frameworks for the quantitative evaluation of skills for adults as well as children (EFA, 2006).

Thus, the discourse about social illiteracy contributed to legitimizing a new ambition for teaching: that school must prepare students for functional reading. In school, functional writing is what students need to do their job: reading instructions, following evaluation protocols, and understanding performance evaluations written by their teachers. All of these various forms of information used to come from oral exchanges in class, but now they have to be read independently.

During the 1970s, when secondary schooling became compulsory for all adolescents in developed countries, the taste for reading ran concurrently with other cultural leisure activities (films, records, television) and the traditional function of literature (friendly exchanges of means of identification and cultural references) was taken over by the entertainment industry. The scientific instruction around which elites had united struggled with the line between academic achievement and commitment to reading: one could be good at math and physics, and recognized as a good student, without engaging in reading for pleasure (Singly, 1993). Finally, when it was obvious that reading was no longer a popular leisure activity, writing became extremely important at the workplace and in daily social exchanges, and it became clear that scholastic achievement was not enough to ensure the mastery of utilitarian reading. Reading was therefore not a skill so easily transferable as was once imagined. Schools have to take on even more responsibility for teaching the use of digital technologies that modify all social practices of reading at the turn of the twenty-first century.

The cultural breaches that spanned the years 1970–2000, more easily lamented than examined, destabilized all reading pedagogies, confronted with rates of failure that they would never be able to reduce. These cultural breaches allowed us to acknowledge, retrospectively, other revolutions in

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24 The levels go from primary school (level 1) to vocational certifications (level 2), then the mandatory high school diploma (level 3) to the level of the general or technical *baccalauréat* (level 4), and the fifth level corresponds with higher-level technical or university degrees.

reading that resulted in great changes in pedagogies of the past. Reading methods for beginners, to keep up with the aims of the Reformation, were based on inherited traditional techniques (clerical training) and innovations that made instruction possible on a grand scale (the printing press). Thanks to Gutenberg, a reading pedagogy, founded on memorized texts, was passed from religious clerks to the people at large, at the cost of the ability to read and write cursive script. This pedagogy of “reading only” had a particular effect on the means of understanding texts: they were memorized and recited by heart. When “extensive reading” called into question this type of learning, the only way forward seemed to be exhaustive deciphering, which produced even more failure at school. That lasted until around 1850, when metal quills and cellulose paper made learning to read easier by facilitating the simultaneous practice of reading and writing. Yet, the move toward a pedagogy combining reading and writing perpetuated the separation of learning into two phases: one phase focused on accurately deciphering text (speaking syllables, words, and phrases) and the other focused on memorizing content (reading to understand and educate one's self). The era of reading and writing instruction thus began by separating teachers into those that examined methods of teaching (phase 1) from those that examined content (phase 2).

Curiously, comparing the more or less modernized syllabic method (dominant in France and countries with systems for spelling words) with diverse versions of phonic methods based on short sentences (dominant in the United States and England), “theoretical” debates continuously underestimated the role of writing in learning. We are still in this debate at the beginning of the twenty-first century, as new communication technologies appear that permit online interactions, both reading and writing, with a keyboard and screen. In the same way as at the beginning of the sixteenth century and in the middle of the nineteenth century, these technical innovations will lead to pedagogical innovations, based on new kinds of interaction underway during any reading and writing process. Undoubtedly, young educators who have learned to read and write in the era of the Internet are currently imagining new innovative pedagogical devices for future pupils.

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**WRITINGS AND REPRESENTATIONS  
OF EDUCATION IN PORTUGUESE AMERICA**

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**ABSTRACT**

Beyond the analysis of educational processes present in the Luso-American society during the so-called *Ancien Régime*, it is necessary to focus on then current conceptions of education, and its appropriation by different walks of life in that society. On the Administrative, ecclesiastical, and legal fields, there was significant production of writing and, within it, representations of education characterized by its links with the most influential European intellectual production at the time, but also by the interposition of cultural environments in different parts of Portuguese America and the experiences of subjects in these regions. The objective of this work is the study of such representations of education by analyzing the writings present in the above pointed fields, in situations where the use of education—whatever its form—emerged as a solution to the problems present in the process of inserting America into the Portuguese Empire's context.

**KEY WORDS**

History of Education; Writings; Representations; Portuguese America.



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# Writings and Representations of Education in Portuguese America<sup>1</sup>

Thais Nivia de Lima e Fonseca

## INTRODUCTION

It was a quite durable view, in the educational historiography of Brazil, that the colonial society gave little importance to education, reflecting the lack of interest of the Portuguese State in the matter. Derived from an interpretation forged in the first half of the twentieth century, which overrated the role of the religious orders in the educational field and the Republican projects for school education in the country from 1890, this view neglected not only the State's actions on school education but also other education modalities present in colonial society between the sixteenth and the first two decades of the nineteenth century. From the early 2000s on, there were studies that went deeper researching Brazilian and Portuguese archives, began to reveal more complex scenarios involving the actions of the Portuguese Crown promoting and controlling educational activities, but also a significant presence of non-school educational practices, many times independent from the State. The need to overcome outdated views on forms of education present in the *Ancien Régime* society in Portugal and its overseas domains, requires researchers to review the dominant conceptions of education in historiography, turning to the determination of the historicity of these concepts, according to the contexts of its production and circulation.<sup>2</sup>

From this perspective it is necessary to ask what were the current views on education in the Portuguese American world between the sixteenth and early nineteenth century, when Brazil was part of the Portuguese domains. In other studies<sup>3</sup> I've been developing a reflection on this theme from the analysis of sources such as: the work of European thinkers produced in the seventeenth and eighteenth centuries; legislation on education produced by the Portuguese State in the eighteenth century and early nineteenth centuries; educational and catechetical work; administrative documentation produced by the agencies of the central government in Portugal and in the

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1 Translation: Daniel Lima.

2 Although this analysis might show some similarities with the methodology proposed by Reinhart Koselleck, this isn't meant for developing a history of the concept of education, as understood by that author (Koselleck, 1992, 1997).

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administrative branches present in America (Denipoti & Fonseca, 2011; Fonseca, 2009). Analyses indicate the main lines of definition of what would be *education* and *instruction* and their roles in that society. Basically following the same movements present in other parts of Europe and its colonial possessions, education was seen as a family and church primarily function, and related to the building of civility, which involved necessarily the formation of a good subject and good Christian.

From authors such as Comenius and La Salle, Locke and Rousseau, along with Portuguese Enlightenment thinkers such as Luis Antonio Verney and Antonio Ribeiro Sanches, education was, between the sixteenth and eighteenth centuries, the object of conceptualization efforts in order to support theoretical proposals about what would be the best education. Understood, in general, as the process of training individuals for social interaction, education was defined as a key element in determining the order and social hierarchies, for the maintenance of good morals and for the observance of the religious precepts. Thus, education was also associated with catechesis and indoctrination, indispensable to the formation of individuals for the good of the State and the Church. Some authors differentially highlighted education and instruction, approaching the second one to the process of learning practical skills that would give greater meaning to the social utility of individuals. These views were also present in works of other kinds, such as dictionaries, encyclopedias, manuals of civility and catechism, textbooks for learning the first letters, and also permeate the legislation and the documents produced by the administrative and legal authorities of the State and the Church.

It is important to note that these concepts did not always involve the school institution because, as formation of the individual, education could be developed in almost any social space: the family and the Church in the first place, but also in the learning workshops, civic and religious activities held in public spaces, in arts appreciation, in relations among the various segments of society, including the relations between masters and slaves, between men and women, between the government authorities and the population. The first systematic initiatives of state intervention only began from the second half of the eighteenth century when, moved by the influence of Enlightenment ideas, several European monarchies—including the Portuguese—made legal and administrative reforms in order to make a part of school education become a matter of state. In Portugal this process started during the reign of Joseph I (1750-1777) with the end of the domain of the Society of Jesus in the field of education and the creation and deployment of the *royal schools*, financed and controlled by the state.

In addition to the implementation processes of the royal education and the analysis of its characteristics, it is also important to consider the forms of circulation and appropriation of concepts about *education* and

*instruction* in Portuguese America, meaning, what representations have been built on them in different walks of life of colonial society, administrative, ecclesiastical, legal fields. The study of these representations has the writing produced in those fields as a remarkable source, expression of situations in which the use of education—whatever its form—emerged as a solution to the existing problems in America's integration process in the context of the Portuguese empire, particularly in the eighteenth century and in regions marked by a more intense urbanization.

Central in these conceptions is the representation of education as the individual's training process for social life and their suitability to the existing order. As an extension of it, education shows itself as an instrument for spreading values and construction of modern civility. From another perspective, education also appears as the result of experience and example to be given by individuals and social groups of the elite of society. These representations of education, according to current thinking at the time, are present in the writings produced in different instances of social life, both in Portugal and in America and are the object of analysis in this article, through the study of some documents.

## EDUCATION IN PORTUGUESE AMERICA WRITINGS

Education as a formation process and its consequences, as discussed above, appears in different types of administrative writing on Portuguese America in the eighteenth and early nineteenth centuries, and one of the most frequent representations is about its function for the “public good”, which means for the good of the state. Present in royal orders, letters exchanged between officials of the colonial administration, requests and petitions, and other types of documents, this representation of education helped legitimize official decisions. The first documents concerning the reform process carried out by the Portuguese Crown in the educational field presented arguments built around those representations. The *Alvará* of June 28th 1759, which marked the end of the Society of Jesus educational domain in Portugal and its overseas domains brought in its original text, the understanding of the importance of a “culture of science” to “the happiness of monarchies, saving up for them Religion and Justice in its purity and equality” (*Alvará*, 1759, p. 673). We found these references in many other writings emanating from the State, for administrative measures on the so-called *Minor Studies*, intended to justify the



necessity of such measures. Often the same kind of text was repeated in various documents, as found in two 1759 decrees dealing with the integration of royal teachers in the administrative staff of the Portuguese Empire:

hearing the needs of Mercy, which is the education and instruction of Youth, to better qualify them for the service of God, and Mine [the King's], and to make able to contribute to the common good of homeland those who laudably practice to their studies. (*Decreto*, 1759a, pp. 674-675)

In his famous *Recopilação de Noticias Soteropolitanas e Brasilicas*, dated 1802, the Royal Teacher of City of Bahia, Luis dos Santos Vilhena, analyzed the situation of studies in that area and remarked about their importance for the good of the state:

Classes are the seminaries of the most precious riches that any state could have, the richest and righteous mine from where you draw the big men, which no empires, monarchies, republics can stand without; without them the Church falters, the States are endangered, the justice is deserted, disorder, lawlessness walk free; more services does a feather to society one day than thousands of swords in years. (Vilhena, 1802, pp. 162v-163)

Population's claims also generated rich writings on representations of education as a requirement for the public good and to guarantee the monarchical order. Even though they may be seen as rhetorical devices, these representations were based on accepted concepts and legitimized on the role of education and instruction for the maintenance of order, social hierarchies and dominant values. A letter sent to the Crown by the municipal council of Cuiabá village, Capitania of Mato Grosso, in 1782, expressed these views in a clear and straightforward manner:

Your Majesty,

Understanding that the good education of the youth is responsible for the spiritual and temporal welfare of the States and the most appropriate means to achieve the great work of public tranquility, which makes the particular object of the rulers and lords of People. So that coming to sadly lack in the first age the solid principles of religion, being what regulates the hearts of men, and run their practices, by a sad and decisive experience is recognized not being possible to tame and retract the excess of human passions, born from the harmful and

pestilential ignorance. In these (...) rugged circumstances we are suffering by lack of teacher in this village, and its area, to teach the youth; but we expect the remedy to this very sensitive evil shall not delay as soon gets to the Royal Presence of Your Majesty our humble representation founded on the Royal Mercy, and remarkable leniency of Your Majesty that much seeks the good of his subjects. This is why prostrated at Royal Throne Feet we are full of humility, begging, and pleading over and often want Your Majesty to send to this land a teacher of grammar and other of Philosophy, to teach the innocent by their example, the most effective way of achieving temporal happiness and eternal, which is the basis of all true wisdom, and firming by this principle prosperity of the Church, Empire safety, and generally all the good Christian society, and civil: so we get to see the still tender hearts growing respectful worship with your Majesty, veneration and obedience to magistrates and ultimately Justice in its purity, and required equality. This is the poignant reason why we resort to Her Majesty's immediate protection, who wants to help us with two teachers, so we ask, for this Village carries many families of white men we want to have the consolation of seeing their children as yours, serving the Church and the State. (Carta, 1782)

Representatives of local government of Cuiabá village cried for something that, at the time, was considered a “right” of the towns that paid a tribute called Literary Benefit, created by the Portuguese Crown in 1771 to finance the royal education. As a taxpayer, the population of Cuiabá demanded the return, that is, the naming of a Royal Professor to give existence to public education in the village. What matters here is the construction of the arguments used by the municipal council in order to legitimize their demand, and at the same time, highlight the policy of the Crown in relation to education. The letter from Cuiabá municipal council does not use the term *education*, but *instruction*, linking to it the same set of elements that, in that context, marked the general definition of education. Although many pedagogical and philosophical works of that time expressed concern in conceptually distinguish between the two terms, it was not uncommon to use both with the same meaning. Some authors, such as Comenius, for example, sought to define education as training for social interaction, while instruction, for him, would be the process of learning about the things of the world needed to “open” to the young's intelligence (Comenius, 2001, p. 175). In addressing the education, Comenius brought attention to its function to prevent that young people were infected by the “corruptions of the world” and that good examples received would allow the “true knowledge of God, of themselves and the multiplicity of things” (Comenius, 2001, pp. 27-28).





These same ideas are present in the document under review. It is noticed that, when requesting a teacher of grammar and another of philosophy, the population of Cuiabá Village gave them in the first place the task of being good examples to the youngster, before they highlight the importance of the subjects that they would teach:

let them teach the innocent by their own example, the most effective way of achieving temporal and eternal happiness, vital to the prosperity of the Church, the safety of the Empire, and generally the good of all Christian and civil society. (*Carta*, 1782)

This perspective, in fact, had clear consistency with the dominant representations about the general purposes of education or the instruction of youngsters, as seen in the first lines of the petition sent to the King:

of good education of the youth, is what the spiritual and temporal welfare of the States depends on, being the most appropriate means to achieve the great work of public tranquility, which is the particular object of the rulers and lords of People. (*Carta*, 1782)

These are concepts that circulated through other writings and expressed the cultural relationship that was built with education and instruction. That's understood, for example, from the text of John Locke in *Some thoughts concerning education* (1692). In it, in addition to favor the education of elites, Locke emphasized the importance of it for the good of the state:

The well educating of their children is so much the duty and concern of parents, and the welfare and prosperity of the nation so much depends on it, that I would have every one lay it seriously to heart; and after having well examin'd and distinguish'd what fancy, custom, or reason advises in the case, set his helping hand to promote everywhere that way of training up youth, with regard to their several conditions, which is the easiest, shortest, and likeliest to produce virtuous, useful, and able men in their distinct callings; tho' that most to be taken care of is the gentleman's calling. For if those of that rank are by their education once set right, they will quickly bring all the rest into order. (Locke, 2007, p. 24)

The *Encyclopédie* also highlighted these functions of education, indicating its order of importance for individuals and for society:



Children who come into the world, must form one day the society in which they will live. Their *education* is thus the most interesting subject, 1) for themselves, whom *education* must fashion such that they will be useful to that society, obtain its esteem, and find in it their well-being; 2) for their families, whom they must support and honor; 3) for the state itself, which must reap the fruits of the good *education* that the citizens that compose it receive. (*Encyclopédie*, 1755, p. 397)

In these two classic and important texts, the collective instance takes central role as the main beneficiary of the education to be given to children and young people, other than themselves, of course. It is noteworthy that we are talking about texts written in cultural contexts marked by Protestantism or the secularism, where public good was related to the order and use to the state. The representations of education found in contexts marked by Catholicism also extended to the Church the actions of education and instruction. That's the case of Portugal and its overseas domains, as shown in the document of the municipal council of Cuiabá village, discussed above, in which education is defined as also being fundamental for the good of the Church and Christian society. In this sense, educating people also meant keeping them in obedience to the Catholic principles and, if possible, to Christianize those still out of it, such as indian people in the case of America. Such objective reinforced the legitimacy of education, whatever its sort, academic or not.

This representation of education as a legitimate instrument of social order and Catholicism spread is also present in the writing produced in the communication between the colonial population and local authorities, or the central government. Even though it was often just an argument, it was based on conceptions and practices inherent in the cultural background of the Iberian monarchies and its overseas domains. In a writing produced by one of the main inhabitants of Paraíba City and addressed to the Secretary of State for the Navy and Overseas of Portugal, this representation was used in an attempt to convince the Crown to provide education for local youth, hampered by the expulsion of the Jesuits and the closing of their schools. In the letter, 1765, Capitão Mor of Paraíba, Jerônimo de Melo e Castro, reported the complaint of the main people of the city, noting that

the total lack of Grammar Masters since the Society of Jesus priests were expelled, has made idleness grow among the youth, in a very serious damage of public utility, and in a short time will reduce everything to a pitiful ignorance, when it's most needed educated men to Christianize the barbarian gentile, which abounds in these hinterlands. (Copia, 1765, doc. 14)



We see in this document two important aspects, part of the current representations of education and its social functions at that historic moment: on the one hand, the association between lack of education, idleness and social order; on the other, the need for forming educated elites to fulfill their civilizing role. These two issues are important pillars of the construction of accepted representations on education and instruction, particularly as they relate to their role in the set of relations between different social groups. The concern with the elimination of idleness was addressed to subaltern social groups, which would justify a minimum of education for them, learning crafts that would prepare them for work and eventually learning to read and write through the teaching of Christian doctrine, indispensable for the formation of good Christians and good subjects. Therefore, the opinion expressed by Capitão Mor Jerônimo de Melo e Castro, of Paraíba City, was not a particular view of the problem. The civil and ecclesiastical authorities communed this conception about the dangers of idleness to the public order and to the nation's prosperity. It can't be explained otherwise part of the contents received by Luiz Antonio de Mendonça Furtado on taking the role of Governor and General Captain of the Capitania of Minas Gerais, which he held between 1788 and 1797. In the document, the Secretary of State for Navy and Overseas, Martinho de Melo e Castro, detailed orders and tasks that should be put in place by the new Governor, one of which would be to encourage mineral and agricultural production in the region and prevent smuggling. Reminding the importance to encourage the people of Minas Gerais, the Secretary stated that there were no doubts

that the people who make the wealth of states are useful and laborious, and not the idle and loafers, which are the ruin of these States; and with this certainty the first ones deserve to be encouraged and protected, as the second ones must be considered outcasts and outlaws. (*Instrução*, 1844 [1788])

The need pointed out by Capitão Mor of Paraíba, of “educated men to Christianize barbarian gentility” may be related to two issues. On the one hand, the civilization of “gentiles”, meaning the native people, which involved in catechesis for religious indoctrination aimed at their conversion to Catholicism and, sometimes, in teaching mechanical skills and/or the first letters. The writing that discoursed on the need and usefulness of a forming and civilizing education for native people is vast and widely studied by Brazilian historiography. We limit ourselves here to indicate an example of how the representations of education as civilization agent were present in both documents produced by the State and the religious orders involved in



the catechetical process, and by other groups interested in this task. In the Capitania of Minas Gerais, where the religious orders were banned since 1711, we note initiatives of secular priests, whose ideas about the education of native are found in detailed descriptions sent to the Crown. In one of them, Father Francisco da Silva Campos requested a position and resources to stay on the task of educating the native of that region. In his education plan he intended to

employ the skills of each one, the jobs of the native, their Arts teaching, and their crafts, the country's agriculture, and their civilization, all founded on integrity and good faith but conducted to attract the spirits of those barbarians that once scandalized become tameless, when love and charity is always greater than the force of arms. (*Requerimento*, 1897 [1801], p. 688)

On the other hand, that need of “educated men” refers to a widely accepted concept that the elites should take responsibility in the education of people who always tend to imitate “the actions of their greatest” as stated Ribeiro Sanches, inspired by Locke (Sanches, 1922, p. 115). The ability of the colonial elites to serve as an example to the people of America was often called into question, which led many occupants of senior management positions to comment, in different writings, about the harmful consequences of the lack of this type of education.

It's important to highlight that, the fact that the Portuguese Crown had started a process of direct action over education, through the creation of royal schools from 1759 on, did not mean that it was done driven by the belief that people had a “right” to education. This is an idea only developed later, related to schooling processes marked by the influence of the enlightened thinking, especially after the French Revolution (Monteiro, 2005). The expulsion of the Society of Jesus and the closure of their schools aimed, primarily, to remove control of school education from the Jesuits. The royal schools were free for all to attend them, but we can not say there was any explicit encouragement, and it was certainly not considered yet, mandatory schooling. Once the dominant conception of education was training for civility, the learning of knowledge was often understood as a secondary purpose or workup for those who would enter seminaries or university.

But not only the elite could become an example for educating the people. Other segments of society were also called to this task, as the military, the clergy members and, of course, teachers of any quality. Some documents are very clear about this, as the dense Lavradio Marquis Report, Vice King of Rio de Janeiro, made in 1779. Commenting on the use of so-called *Terços Auxiliares* military detachments, the Marquis understood that its organization would



help soldiers and officers to put themselves in the “custom of subordination”, and that for being closer to the people would help compose the chain of obedience examples and respect for the law and the king, without which it would be “impossible to govern with peace and subjection” (*Relatório*, 1779).

Members of the clergy would also fit the educational role, not only as responsible for the spread of the doctrine—through celebrations, sermons, catechisms—but also by examples of personal conduct and fulfilling their ecclesiastical duties. In that same *Instrução* given to the Viscount of Barbacena in 1788, the Secretary Martinho de Melo e Castro highlighted these obligations of the clergy as the first of the seven most important parts of the government of the Capitania of Minas Gerais, “may the clergy and ministers of Church fulfill the obligations that the same Church prescribes them”, and to do so

teach people the precepts of the law they profess themselves, to preach the gospel to them, give them the sacraments and lead them with zeal, disinterestedness, and regular behavior of a good and exemplary pastor of the church, which they are children of. (*Instrução*, 1844 [1788], p. 5)

A lot of abuse done by clergy were reason for complaints of the population and concern for the Crown, especially those related to the excessive tax collection and contributions for the practice of ecclesiastical functions. In addition, it was also a fact that many clerical members got involved in gold leakage through illicit means. Thus, the use of representations of exemplary clergy and good shepherd of his flock, present in these official writings, not only expressed the desirable image for this segment of society but also helped to highlight the misconduct and justify control measures. In the same document analyzed above, the Secretary Melo e Castro ordered the new governor to care for the bishop to control those abuses and report his progress to the Crown, proving to be worthy of the trust of the Queen. The principle of obedience to the ruler was often remembered in official writing, and charged on civilian, military, clergy, occupants of the most varied positions in the colonial administration in its political, legal and military dimensions. This principle strongly marked the representation of power and social hierarchies, and its practice also meant to display exemplary acts that were imbued with pedagogical sense.

The importance of the clergy presence in Portuguese America exceeded its primary functions strictly related to religious activities, which put in evidence the issue of examples to be given in other instances of everyday life, especially in school education. The creation of the royal schools from 1759,

and the consequent establishment of the career of royal teachers–employees” admitted in civil service examination and their salaries paid with the resources of the Crown gathered from taxes–has attracted large numbers of secular priests for employment in these classes, mainly for the teaching of Latin grammar, but also reading and writing. Especially in the latter case, teachers, whether cleric or secular, were required to teach beyond the first few letters, the catechism and Christian doctrine. Their personal and professional conduct were particularly important, as established in the legal and administrative written on the so-called Pombaline reforms of education, and that forced teachers to a certain pattern of behavior.

The 1759 *Alvará*, for example, indicates some of the requirements for admission of teachers to the service: besides the necessary knowledge to exercise the royal teaching, should have “good and approved behavior” (*Alvará*, 1759, p. 677). These would be constant demands on notices that would be published to the fulfillment of the royal teaching jobs and that, during the second half of the eighteenth century, would consolidate the process of supervision and control over the work of teachers. One of the first steps taken soon after the start of the reforms of education by the newly named General Director of Studies, D. Thomaz de Almeida, was the publication of a notice for providing royal lessons of Latin Grammar, Greek and rhetoric. Discussing the criteria for the selection of new teachers, the Director indicated that should be “at the same time in life, and exemplary morals, and science, and known condition” to ensure the success of education that they should develop (*Edital*, 1759, pp. 669–670).

Prioritizing moral qualities of the candidates for royal teachers was consistent with the current concepts of education at the time, as we have indicated in this analysis. In the notice prepared by the Director of Studies they are the first requirements, followed by the specific knowledge of what would be taught, and teacher's background. Their skills for teaching different subjects–reading and writing, Latin grammar, rhetoric, philosophy or Greek–were not underestimated, but without the moral qualities, at least theoretically, the other qualifications would not suffice. There is, however, one aspect that can not fail to be remembered: there was not, at that time, specific processes for teacher training, which attached great importance to the experience and knowledge itself, no matter how it had been acquired. In fact, the process of evaluation of candidates was very flexible, and the experience that could come from the teaching exercise could be considered in case the applicant showed potential qualities.

Some of these situations become clear in the writings about the royal teachers admission processes, and leave us clues about how some of these aspects were part of representations of education and instruction, present in that society. The documents through which the State admitted teachers to the service, often serving their own requests, are fairly representative about



the matter, as the granting of mercy to Domingos Fernandes Barbosa e Torres de Pita Rocha so he would become Royal Teacher of Latin grammar in the Village of Victoria, Capitania of the Espirito Santo. In the document, the candidate's potential was valued on the assumption that the experience to be gained would be worth his approval. The final evaluation reported that

by the Examination notice that reaches out to the Real Presence of Your Majesty, contains the capacity of the supplicant, and by the exercise of the magisterium may soon turn out to be perfect; because those things forgotten in his exam, are easily acquired with very little exercise time. (*Consulta, 1770*)

The concepts and practices of a school type of education were not associated with an educational process itself. Therefore, education could often be represented as the result of specific and isolated actions that endowed the individual with skills competence to exercise any activity, especially the intellectual ones, as seen in the writings produced by the municipal council of the Village of São José, Capitania of Minas Gerais, to attest the competence of the teacher of Latin grammar in that location:

The Presiding Judge and more officers of the Council that we serve according to the law, this year 1800. We certify that the Chair of the first letters of the Village of São José finds itself vacant for more than five years with remarkable loss of its residents, and Joaquim Marques Temudo, legitimate son of Domingos Marques Temudo, attended the class of Latin grammar, in which always distinguished himself well for his advance, as for its commendable conduct; which principles themselves contain necessary circumstances for the mentioned to exercise the employment of the same chair. (*Requerimento, 1800, Doc. 8*)

The presence of educated individuals versed in knowledge that could open them the doors of the royal teaching and other positions in the colonial administration would be undoubtedly useful to State's demands, but would not necessarily guarantee the improvement of the general conditions of public education. Writing on the cultural environment of Pará City, getting to know that location during his scientific expedition, Alexandre Rodrigues Ferreira was admired

though many educated men, in all sort of subjects, have been coming to this city, inhabitants haven't been showing any progress. Many have been to the city in the past, a Condamine, one Burneli, a Samuccête, a Gronfel, a Calheiros, a Galussi,

and still reside in the state, in addition to mathematicians and employed engineers in the marquees, one Charmont, a Mardel, and a Wilkeins, and not enough to overthrow ignorance from its throne. The clergy is particularly very little instructed: moral theology is explained to them, all founded on Scriptures, but scripture itself is not explained: this is the fruit expected a rootless tree. (Ferreira, 1784)

It does not seem that manual activities were already clearly associated with educational processes, as these were seen as forming the character and conduct, although the mechanical activities were identified as important for the improvement of behaviors to help prevent idleness, always dangerous. I believe it is reasonable to state that the mechanical activities were then more commonly associated with the idea of instruction, focused on the field of practical knowledge, according to the definitions often present in the writings of the time. That would explain why instruction used to be associated with the teaching, and education with the formation, although this was not a general rule, much less a consolidated and definitive notion. But it is suggestive realizing that when teaching was identified as education, it concerned the knowledge of intellectual nature; when it was identified as instruction, it referred, in general, to the practical knowledge, technical and/or mechanical.

In the context of everyday life these distinctions can be found in civil registry, especially *post-mortem* inventory processes and orphan tutoring accounts. When it comes to representations of education that include the teaching of knowledge, the most common referred to the learning of the first letters, for orphans with better economic situation since, in general, it implied the payment of private teachers. As has been said, mentoring accounts are documents rich in such references, as the documents relating to the inventory of Lieutenant Custódio José de Almeida, of the District of Rio das Velhas, Capitania of Minas Gerais, and the mentoring accounts his son José. In the accounts, the tutor hired to teach the orphan in 1796, Captain José da Costa Ferreira, claimed payment of lessons, stating that

the death of Lieutenant Custódio José de Almeida left a minor heir and this Court appointed officer Eulelio Manoel Teixeira to be his tutor, which soon took care of the education, sending him to learn to read and write and the Christian doctrine. The supplicant should have received half gold *pataca* per month, which had its beginning on April 25th and it's already past ten months. That is why the supplicant requires, as the mentor states the truth, the satisfaction of the time expended as well as the shaping of a big coat that made to him for half an octave of gold. The sum would be three octaves of gold. (*Conta*, 1799, p. 19. Emphasis mine)





This document presents a very clear understanding that the teaching of reading and writing was part of a child or youngster education, especially when there were economic conditions for this. We know that taking care of the education of the orphans was a legal obligation of the tutors, defined in the *Código Filipino*<sup>4</sup>, which explains the significant presence of references to education in registry writings on the mentoring processes. But the important thing for this analysis, is to check what kind of education concept those writings refers to, meaning, what kind of representations of education are present. The Inventory accounts of João Coelho da Silva, a resident of the Parish of Santa Luzia, District of Rio das Velhas, made in 1793, clearly indicate these representations, according to the cases of each of the four children of the deceased. Boys and girls were the object of character forming education, but received different instruction: reading and writing for boys, and manual activities for girls. In the accounts, the tutor Antonio Coelho da Silva responded to inquiries from the Judge of Orphans:

Asked by the Judge about the orphan's condition, Tutor Antonio Coelho da Silva's attorney replied that João was healthy and was at school learning to read and write, and found in the tutor's company, being well treated, care and dress and give proper education.

And being asked about Marianna, the attorney replied that she was healthy, learning to sew and other things a woman need to learn, and could also be found in the tutor's company.

Being asked by the Judge about the orphans Maria and Elena, the attorney replied they were healthy and in the company of the tutor, who was raising and giving them all the good education that is needed to a child of such a young age. (*Inventário, 1789, fl. 58-59*)

In this document education is associated with the household activities, which would be the responsibility of the family or their substitutes/representatives, such as tutors, “care and dress and give proper education”, “give all the good education that is needed to a child of such a young age” are statements that indicates this representation of education, as already discussed, associated to the process of forming of the individual, for their adaptation to life in society, and would involve the transmission of values, behavior standards and the principles of religion. Note that in this writing, the teaching of knowledge—reading and writing, and manual activities—was not defined as education itself. These distinctions are present in other documents of the same nature, sometimes quite clearly, as in the tutoring accounts of orphans of Pedro Rodrigues, from the same District of Rio das

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4 Portuguese legal compilation, also valid on overseas domains.

Velhas, in which the tutor stated that “orphans Joachim and Joseph are in the company of their mother in the same house where lived the deceased Pedro Rodrigues, living with good education and teaching” (*Conta de tutoria*, 1772).

But clarity around these conceptual distinctions is only apparent, and can express the common sense, the way most people dealt with the notions of education, instruction and children raising. There are indications that, from a conceptual point of view, there was considerable controversy, such as we find in an interesting document in which a Judge of Orphans in Sabara, Capitania of Minas Gerais had a discussion with the curator of orphans José Gonçalves Chaves, in 1772. At that time the curator José da Rocha Machado had declared in his account that he had not used the property of the orphans to pay for their education, as prescribed by law. His excuse was that education wasn't included in the compulsory expenditure, that would only be feeding, dressing and caring for the health of orphans. This argument was contested by the judge and supported by the law and its interpretations, he stated that, contrary to what the curator said,

by food it's not only understood the eating and drinking but also many more circumstances (...) because where food is given to be “jure sanguinis”<sup>5</sup>, also are the expenses made in teaching and study. (*Conta testamentária*, 1772, fl.100)

The judge's considerations were based on the *Código Filipino*—which established the procedures for the raising and education of orphans according to their “quality and condition” (*Código*, 2004 Liv 1, Tit 88). This meant that tutors and curators would have different obligations towards orphans, according to their origin of birth, beyond feeding, dressing and caring for health. If the orphans were children of farmers or mechanical workers they would be sent to learn the crafts of their fathers; if they had wealthy origin they would be sent to learn to read and write. The Judge of orphans of Sabara, well informed about the legislation and case law, contested the trustee's arguments based not only on the *Código* but also on his commentators. Quoted by Judge, Payva and Pona stated that

The Father is not required at first to send his son to study, because there's no law that makes the father to do so, being the child under his power; if the father willingly sent his son to study the first letters and his son is able to learn most sciences, then the father is required to take care of the necessary expenses, and likewise the tutor. (...) This should apply to everyone, since they are mechanical

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5 The expression is *jus sanguinis*, meaning “right of blood”. Source: <http://www.dicionariodelatim.com.br/jus-sanguinis/> (Retrieved 01.10.2016).



man's sons; But when they are the children of farmers, since their father haven't sent them to study, the judge, or guardian noticing the orphan is able to achieve the sciences, should send him to be taught because the farmers are noble men, and greatly privileged of the exercise of such art, and the whole Republic depends on its use, as a source of food for every human creature. (*Addicçoens*, 1761, pp. 163-164)

The late José Gonçalves Chaves, father of the orphans mentioned on the tutoring process, was a merchant and dealer, which put him in a more affluent social group in the region where he lived. According to the law and custom, therefore, his orphans could be sent to learn to read and write, what would be done at the heritage's expense. What matters in this case are the different forms of appropriation of concepts of education, teaching and raising, as were interpreted the laws, and according to the usual practices. As stated by the jurist Payva e Pona, quoted by Judge of orphans, attending studies—whether in school or in private settings—was not required for any segment of the American Portuguese society in the period we are analyzing. And even if that education alternative was more common and even recommended for the most disadvantaged social groups, there was the possibility that children and youngsters from other social backgrounds were sent to studies, if they had skills and/or capacity to do so.

In Portuguese America these possibilities seem to have been quite recurring. We have found significant evidence of this, especially in relation to the more urbanized areas, such as the Capitania of Minas Gerais, privileged place in our research. This effort of analysis on the ways in which the population of these regions appropriated of what we call representations of education, can still add other writings that expressed these appropriations. See, for example, documents that stated relations between portions of the poorest people and different institutions. One of the duties of city councils was to pay for the raising of exposed children who had been abandoned at the doors of churches, houses, or in the *wheels of the exposed*. A significant part of those who were paid to raise these children were women, who often sent to municipal councils their complaints of late payments. To have their complaints accepted, they provided documents indicating the names of the children who they were raising and the conditions they were in, in writings that made clear the presence of all social understandings—and they were also legal—on education and its consequences. Joanna de Souza Teles was one of those women raising exposed children who addressed the municipal council of Sabara village, Capitania of Minas Gerais. Asking for payment, she explained she had with her a boy named Manoel, and

she has been raising him, and educated and currently has him attending the School of First Letters and Music, as it shows in the parish notes and as for the benefit of the same boy, she needs the wages the Senate use to provide, to pay for his garments. (*Contas*, 1805, p. 49)

It's important to consider in the analysis of the production of this writing, the intermediation of the clerk of the council, possibly the most informed person about the formal procedures for forwarding these documents and also on the legal concepts relating to the various dimensions of a child's education, meaning, raising, education and instruction. This brief document is an example of the registration of these understandings. Joanna de Souza Teles explained she was fulfilling these steps, probably since the boy was very young: the raising was legally determined up to three years old; education did not have an established term, but was generally considered up to about twelve or fourteen years old; instruction could start by the age of seven and, as discussed at the beginning of this article, was associated with the acquisition of skills, preferably those that could serve to the person's own maintenance, when old enough to work. In the case of the boy Manoel, under Joanna Teles care, instruction was being organized in two directions: the learning of reading and writing, and music. The latter was, in the Capitania of Minas Gerais, a rather requested activity, considering the relatively busy cultural environment, influenced especially by local religious life.

For other people, opportunity for education depended on obtaining benefits from assistance to the poor, coming from actions and/or institutions linked to charity, such as seminars for poor children, founded by private initiative with the approval of the Portuguese crown. This was the case, still in Minas Gerais, of the Seminary of Vinculo do Jaguará, not a very well-known school at this time, that worked, it seems, between 1807 and 1811<sup>6</sup>. To be accepted as a student, the boy—or his representative—should present an application in which would prove his condition and justify his necessity. Applications sent to Jaguará Seminary have very significant indications of the possibility of a child or young poor receive an education that, at first glance, it would be a privilege of the wealthy groups. In one of these applications, Joaquim José de Araújo asked to be accepted into the seminary, claiming that his father was

a great decadence of goods and poverty, [ ] with many children, in such a way that still wasn't able to send the supplicant for the education in the first letters or at least assist him with proper clothing, and because the supplicant has no other means to seek the so wanted instruction, asks the mercy of your highness to give

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6 About this Seminary, see: Fonseca, 2009.



him the grace granted by His Majesty for the benefit of poverty, admitting him in the seminary to be instructed to least on the first letters, so much needed, and to register it in the appropriate book. (*Requerimento*, 1807b)

In this requirement poverty is attested by the family's difficulty in providing one of the basic items for education, according to the current understanding at the time, as already discussed, namely the fact that it involved food, clothing, and health care for the children and the youngsters. The need for instruction in reading and writing could be seen as an opportunity for future support, for jobs in public or private functions that required this type of skill/knowledge. But the function of the seminary was seen beyond the instruction<sup>7</sup>, also being associated with ideas on education, considering its origins as an assistance institution. However, as we have noticed in other documents, the two definitions were often represented as the same thing. Another application sent to the seminary expressed these two “functions” of the institution, according to the understanding of the priest who testified the need for José Simplicio Guimarães to be admitted to study Latin grammar. According to the priest, the young man was

white, clean blooded, fatherless, very poor, and with good manners, and therefore worthy, fills the circumstances to be admitted, and receive the grace to be educated in Jaguara, which again has created for instruction, youth education. (*Atestado*, 1807)

But in another application, this distinction is ignored, and education is represented covering both directions:

Says Eugenio Pereira Silverio, who lives in this Parish of Santa Luzia, he as supplicant is entirely poor as stated in the affirmation of parish Reverend priest and also loaded with children, and two among them are already in terms of being able to receive proper education, namely Silverio, age of eight, and Felicio, age of six, as attested by the provided birth registry, as your highness will execute the order which approved by the intentions of the institutor of this Vinculo for the benefit of the poor, in whose circumstances the supplicant asks for the mercy of your highness to deign to admit his mentioned children at the Seminary of the first letters in order to be educated. (*Requerimento*, 1807a)

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7 The seminary offered the teaching of reading and writing, grammar and Latin.

## CONCLUSION

The purpose of this article is not to determine the existence of precise and definite concepts about education and instruction, but to analyze the production of meanings of these two dimensions and how they were appropriated for different types of writings in the American Portuguese world, between the eighteenth and the first years of the nineteenth century. As analyzed in administrative, ecclesiastical and legal fields, there was significant production of writings and, in it, representations of education characterized by its links with the most influential European intellectual production at that time, but also by the interposition of cultural environments in different parts of Portuguese America and the experiences of the subjects in these regions. This analytical effort is important to help clarify the historicity of a dimension of social life—education—so naturalized in our days, but at other times assumed meanings that do not always correspond to the widespread idea that education is linked necessarily to school institution and that it is, mandatorily, a state's function.

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**FIRST LINES OF SCHOOLING:  
REGIUS AND PRIVATE TEACHERS IN BRAZIL, 1759-1834**

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**ABSTRACT**

The article presents a brief overview of education in Brazil between 1759 and 1834. Delimited by the creation of the position of Regius teacher and by the decentralization promoted by the Additional Act of 1834, it discusses the process of state control, secularization, and promotion of schooling in the Portuguese America and the independent Brazil. Considering the regional characteristics of the colonial territory, the analyses carried out focus on the Capitania de Minas Gerais [Captaincy of Minas Gerais] because of its economic importance in the context of a “world economy”. The article provides a quantitative assessment of the schooling in various regions of Brazil and presents the profile of the teachers who worked in Mariana, Minas Gerais, contributing to the study of the first lines of school education in the Luso–Brazilian modernity.

**KEY WORDS**

Teachers; Education; Minas Gerais; Brazil; Centuries eighteenth and nineteenth.



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# First Lines of Schooling: Regius and Private Teachers in Brazil, 1759–1834<sup>1</sup>

*Alvaro de Araújo Antunes*

## INTRODUCTION

Assessing the entire production dedicated to the History of Education in Brazil, specialized historiographical research shows a shortage of studies on school education in the colonial period (Falcon, 2006; Faria Filho & Vidal, 2002; Fonseca, 2006, 2009a)<sup>2</sup>. The number of articles, communications, theses and dissertations that deal with education in Portuguese America is substantially lower than the number of studies devoted to the imperial period and, above all, the republican one (Antunes, 2015). Not characterizing a full absence, the dearth of studies on education in Portuguese America, which is noticeable by the comparison with the whole production in the area, deserves to be questioned for the benefit of future investigations.

Although it is difficult to determine the reasons for the historiographical production wanes, the authors Ana Maria de Oliveira Galvão and Eliane Marta Teixeira Lopes suggest as possible causes: the lack of documentary records on the everyday education in Portuguese America; the fluid and inconspicuous nature of education in the colonial period; the reduced contribution bequeathed by the teaching ways and structures from modernity to contemporaneity (Galvão & Lopes, 2010, p. 38). It is true that the causes listed require some kind of proof, being, above all, a commendable effort to understand the historiographical trends. Nevertheless, the alleged reasons that have been preventing the studies on education in Portuguese America should be questioned as to their epistemological relevance and validity, among other reasons, so that they will not become, by the power of inertia, insurmountable obstacles.

Initially, it is necessary to question the idea that the colonial period would be of little contribution to “understand the present” of education.

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<sup>1</sup> Research with support from the Foundation for Research of the State of Minas Gerais [Fundação de Amparo à Pesquisa do Estado de Minas Gerais — FAPEMIG].

<sup>2</sup> Some surveys indicate percentages lower than 5% of studies dedicated to the colonial period against more significant figures for the republican and imperial period. Thaís Nivea de Lima e Fonseca, for example, examined the papers presented in specialized, international, national and regional meetings promoted in the early 2000s and found that the papers on the history of education for the so-called colonial period did not exceed 2% (Fonseca, 2009a). Denice Catani and Luciano Faria Filho, based on the investigation of one hundred fifty-seven research papers presented in the Thematic Working Group of History of Education in the National Association of Post-Graduation and Research on Education [ANPED] between 1985 and 2000, identified a percentage of 3.2% of studies on the colonial period (Catani & Faria Filho, 2002, p. 124).



Against this presumption, it is worth bringing back what António Nóvoa said about the History of Education. For him, regardless of the period circumscribed by the research, the History of Education is fit to cultivate a “healthy skepticism about the acclaimed educational innovations” (2004, p. 10). Besides this practical contribution and the specificity of an area of study, it is possible to add that History, in the breadth of its scope, contributes to the perception of otherness and to the construction of identities. The exotic past spells out the fundamental differences, and, at the same time, allows the perception of the familiar registered in the flow of the human and local continuities. Thus, the study of education in a historical perspective would contribute to the perception “of the logic of the multiple identities, through which we define memories, traditions”, beliefs and solidarities (Nóvoa, 2004, p. 10—author’s translation).

Another point raised by the authors relates to the fluidity of the concept of “education”. Indeed, in Portuguese world and the modern period, the concept of education had a breadth of meaning that corroborated an inaccurate awareness of its conceptual boundaries. In the dictionary of Don Raphael Bluteau, written in the early eighteenth century, the term education refers basically to: the dignified treatment of people according to their qualities; the act of raising someone; and the teaching/improvement of an understanding (Bluteau, 1728, v.3, p. 29). From the definition in the vocabulary, education would be something common to all, although variable depending on the quality of the student. The entry does not distinguish a direct association of the act of educating to an entity or a specific institution, which could raise the interpretation of education as something fluid and informal. Even when reduced to the meaning of “teaching and improvement of knowledge”, education keeps its boundaries very shadowy. However, in the same dictionary, the entry “school” names a place of cultivation of science, refinement and acquisition of knowledge that demands some spare time and dedication to studies (Bluteau, 1728, v.3, pp. 216-217). Thus, restricting the meaning given to education and slightly shaping it into the school form, the act of instructing would reach only a privileged set of people who had some spare time. Education, in its broadest sense, could be acquired in family, workshops, anyway, in the ample space of relationships promoted by social agents. In turn, school education would depend on a specific place, on spare time, and on agents able to engage each other in the cultivation of knowledge, among which the teachers linked to the Church and the State or acting more or less independently would be distinguished.

Although limited, the education promoted and structured by the religious orders and the secular administrative structures was not negligible. As a result, the vast majority of studies on education in Portuguese America chose the theme of education provided by religious orders—especially the Ignatian—

and education reforms promoted in the reign of D. José I [Joseph II], which brought education into the State orbit. Despite the initiatives of D. João V [John V], it was from 1759 that the Portuguese crown took a declared commitment to education. Under the influence of the Enlightenment bias, education starts to be understood as responsible for “making society happier and men, grown by virtue and science, more aware of their duties to humanity and to the homeland” (Araujo, 2003, p. 54—author’s translation).

The education offered by the State and the Church demanded a concentration of skills and responsibilities that generated documentary records. Such records have enabled investigations about instruction in Portuguese America. Thus, even if representing a small percentage of the overall production dedicated to the history of education, existing studies on Portuguese America contradict the alleged lack of documentary records on school education in the Luso-Brazilian modernity.

A more comprehensive and delicate look can reveal that education records abound. In the broadest sense of the definition or in its precise meaning as school improvement, education permeates each and every written record. The writing culture, fostered in school or not, can be enjoyed in the richness of its forms in each line, each word, each letter of each manuscripts and printed documents that circulated in modern times and now rest in the archives (Magalhães, 2014). Given the enormity of the direct and indirect records on education, it is untenable to claim the absence of documents for the History of Education in Portuguese America.

As stated, the reasons presented to explain the relative lack of studies on education in colonial Brazil are not epistemologically plausible and do not deserve credit. In fact, besides these reasons to explain the lack of studies on education in Portuguese America, a limitation of perspective and analytical provision imposes itself on the area. We must break with the baseless assumptions and address the methodological difficulties posed against the research of a multitude of historical records waiting to reveal the many facets of education.

Having considered the feasibility of studies on education in Portuguese America and set out the principles that should encourage and guide them, this article proposes to contribute with a brief quantitative overview of schooling in colonial Brazil, between 1759 and 1834. In this period, a centering process in which the Portuguese and Brazilian States were responsible for the coordination and management of school education started, which bequeathed to posterity rich documentary series. Based on documentary evidence and in specialized studies, this paper evaluates the said centralization process, highlighting its geographical scope and the secularizing character assigned to it. Finally, it advances in an attempt to draw a profile of the teaching profession in Brazil, considering both “Regius teachers”, paid by the State, and private tutors. In order to do that, the article presents the results of a wide and diverse



documentary research focused on the city of Mariana, one of the districts [termo] belonging to the county [comarca] of Vila Rica of the Captaincy of Minas Gerais, located in the center of Brazil.

## DIMENSIONS OF EDUCATION IN BRAZIL: REGIONAL SPECIFICITIES AND SECULARIZATION IN PERSPECTIVE

School education included the formal and official action of the State and the Church throughout the colonial period. It was an action limited by the reach of the structure able to offer instruction, and by the provisions of social exclusion characteristic of the *Ancien Régime* and the slave and missionary system. The education promoted directly by the Crown was more sensitive in the second half of the eighteenth century. In its turn, the Church has never ceased to watch over the moral and intellectual formation in Brazil. Priests spread the language and the Christian faith to various peoples and by various means, in the benches of the churches and seminaries, as teachers, and public and private roles. Was it promoted by the State or the Church, education was systematically and progressively monitored, acquiring an official status.

Since the beginning of the colonization of Brazil, the Church sought to catechize and instruct the Amerindians, without neglecting the education of the children of families who could afford to pay for the private education and seminary costs. Linked to religious orders, regular or not, the Church priests contributed to spreading a sort of education that blended worshiping and culture (Bosi, 1992). Through the sermons, the masses prayed in Latin, the teaching of the seminaries, and the civilizing action of the missions, the literate culture would permeate diverse strata of society. As well noted by José Maria de Paiva, literacy was religious, teaching was characteristic of the Church (Paiva, 2004, pp. 80-81). A church that, by the regime of the *padroado* [Royal Patronage], served the Crown.

Through the Orders, the Church cultivated literacy and contributed to the civilization of the vast extension of the Portuguese Empire. In Portugal, in the late sixteenth century, the Jesuits built schools in Coimbra, Lisbon, Évora, Porto, Braga, Bragança, Angra do Heroísmo and Funchal. They also had a university in Évora and taught at the University of Coimbra, which was responsible for providing instruction to the finest young people of the society (Ferreira, 2004, p. 59). Even at that time, in Portuguese America, the Jesuits opened colleges [colégios] in the captaincies of Bahia, Pernambuco, Rio de Janeiro, Espírito Santo, São Vicente, and primary schools and various missions throughout the countryside, and especially the coast. Between 1554 and 1759, the



Society of Jesus administered 36 missions, 25 Ignatian houses 18 institutions of secondary education and various other primary schools (Shigunov Neto & Maciel, 2008, pp. 186-187). After all, according to Laerte Ramos de Carvalho, “the penetration and expansion of missionary work depended fundamentally on the establishment of schools” (Carvalho, 1978, p. 110).

Ahead of education and extending the Church's presence in the world, there were religious orders other than the Society of Jesus. The Franciscans, for example, developed catechetical actions in several locations in Brazil, among them in the captaincies of: Pernambuco, Rio Grande do Norte, Alagoas, Paraíba, Grão-Pará and Maranhão. According to Luiz Fernando Conde Sangenis, the Franciscans founded the School of São Francisco, in São Vicente, and the “convent-university” of São Antônio, in Rio de Janeiro. In the mid-eighteenth century, the Franciscans opened 29 convents, some with free lessons of grammar and basic literacy (Sangenis, 2004, pp. 100-101). The data presented could be multiplied if the contributions of other orders and women's institutions of seclusion and gathering are considered.<sup>3</sup> In any way, even with the narrower picture table, it is possible to discern the prominence of the religious orders in the dissemination of the written word and the Christian faith in the Luso-Brazilian modernity. This presence of religious ahead of education was shaken, but not eliminated, with the educational policy inaugurated in the reign of Joseph I.

In 1759, the government of King Joseph I ordered the shutdown of all colleges and classes established by the Society of Jesus. At the same time, as a palliative measure, he created free schools of Latin Grammar, Greek, Hebrew and rhetoric (Fernandes, 1994, p. 70). The persecution of Jesuits solved a series of impasses between the Crown and the congregation, involving economic and political issues related to the captaincy of Grão-Pará, the Treaty of Madrid and the Guaraní Wars (Falcon, 1982). Although it was a systematic attack against the Ignatian, to Laerte Ramos Carvalho “Pombal's, or better yet, King Joseph I office's antijesuitism was more an imposition of circumstances than the result of a pre-established program” (Carvalho, 1978, p. 102).

Although motivated by the circumstances, the attack orchestrated by Pombal's office was still systematic, since it recognized the power of the Society of Jesus in the larger sphere of their influence areas, including education, which came to be recognized as fundamental for the modernization plans of the Portuguese State. It was not without purpose that public lectures were originated at the same time the Jesuits were expelled. It was imperative to stop the ascendancy of the Ignatian above the

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<sup>3</sup> Leila Mezan Algranti (1999) and Maria Beatriz Nizza da Silva (1981) studied the peculiarities of this schooling dedicated to girls. According to these authors, the education of girls was restricted and focused on the role that they would take in adulthood. Female education was seen as necessary, since they would be the first teachers of their children, which emphasized their role as mothers and teachers. Because of that, their teaching should be different from that of the boys. These institutions prioritized learning to read, write, count, sew, and embroider, besides the religious education.



people and, for that, the Crown had to take responsibility for schooling. It becomes clear, by this logic, the importance given to education, which in the following years, would undergo a wide reform that would touch all levels of training.

The transformations inaugurated in 1759 gained strength with the implementation of educational and financial policies that enabled the creation of a true network of state schooling. The measures were taken “in order to unify the system by the adoption of a method, the definition of teaching contents, the authorization for banning books or establishment bureaucratic rules to be followed by the schools etc.” (Villela, 2010 p. 98–author’s translation). In order to economically support the changes, a tax called “literary subsidy” [*subsídio literário*], which levied on the production of brandy, vinegar and carne verde (“green meat”—meat from animals slaughtered recently, with no preservatives), was created. Managed by the Royal Treasury, the literary subsidy created conditions for the establishment of a public school system. With the tax, the State would facilitate its social intervention, albeit unevenly and with limitations.

In 1772, a plan that conjectured the recruitment of 837 teachers to meet the educational demands of various locations, with special attention to urban and coast areas, was set up (*Plano de 1772—Plan of 1772*) (Boto, 2004, p. 171). Within one year, the plan underwent a revaluation and 88 extra classes were added. Just over half of the schools created in recent years were aimed at basic literacy, that is, reading, writing, counting and catechism. Less demanded by the general population than basic literacy, secondary education would be responsible for nearly half of all the royal schools created. The relationship of these proportions, although slightly favorable to primary schooling, spells out an increase of technical knowledge, which corresponded to the Enlightenment stance of knowing oneself and benefiting from nature (Cassirer, 1994, pp. 65–66).

Practical limits were imposed on the reform and were evident from the start. Not all intended classes were actually opened. In the metropolis, from the 526 classes of basic literacy intended, only 33% were provided with teachers (Fernandes, 1994, pp. 75–76). The concentration of classes in certain localities also represented a clear restriction on the scope of the State initiatives. The Portuguese metropolis, with special emphasis on Lisbon and the heads of county, held the vast majority of the royal schools created. The reasons for this preference can be found in the developmental Pombaline spirit, as well as in the colonial exploration policy, as the literary subsidy collected in all parts of the Portuguese Empire served to promote unevenly distributed education. Whatever the real reasons for the uneven distribution of royal schools, the understanding of school education as exclusionary by principle would not be contradicted.

In Portuguese America, each region responded in a peculiar way to the impact of the expulsion of the Jesuits and to the effects of the Pombaline educational reform. For Mato Grosso, a captaincy located in the interior of Brazil, the result of these changes was limited, if not late. Gilberto Luiz Alves considered the presence of Jesuits in this inland region of Brazil to be small. Thus, schooling in Mato Grosso did not suffer from the expulsion of the Jesuits and did not immediately collect the fruits of the educational reform promoted in the reign of King Joseph I. It is possible to find incomplete references to Regius teachers only at the late eighteenth century. Scrutinizing memoir reports, Gilberto Luiz Alves found mention to only five Regius teachers in that region. In the author's opinion "if they existed, previously, it must have been very rare to have colonial masters in Mato Grosso" (Alves, 2004, p. 3).

In São Paulo, where the Jesuit presence was striking, the effects of the expulsion were attenuated not by the confining incorporation of Regius teachers, but by the presence of the monasteries run by Franciscans and Carmelites. Due to this presence, it is possible to deduce the maintenance of an education of religious nature, although unable to meet all the needs of the local administration, which resented the lack of people trained in literacy (Fragoso, 1972). According to Maria Beatriz Nizza da Silva, in 1768, the Governor of the Captaincy of São Paulo complained about the lack of people instructed for the education of the young. Only in 1774 did a local administrative determination announce the creation of basic literacy, Latin, Greek, rhetoric and philosophy classes (Silva, 1984, p. 104).

The news of teaching in Mato Grosso and São Paulo could indicate that the immediate results of the reform of 1759 were hardly experienced in Portuguese America. Such a statement, however, must be relativized by an approach that considers the plurality of regional specificities.

In many places of Portuguese America, the arrangements to mitigate the impact of the expulsion of the Jesuits were noticeable.<sup>4</sup> Laerte Ramos de Carvalho (1978, p. 129) and José Carlos de Araujo e Silva (2011, p. 55) tell us that in Bahia, as early as 1759, tenders for the provision of Latin and Rhetoric classes were opened. Nineteen candidates showed up, among which there were priests and Minorites, including two who had left the Society of Jesus. The existence of these priests was associated with the presence of religious orders in the region, a factor that must be considered to scale the secularization that would be provided by the Pombaline reform in education, an aspect that will be further explored when analyzing the case of Mariana.

The imminent effects of the Pombaline reform in other captaincies of Brazil are remarkable. In 1759, Manoel Silva Coelho and Manoel de Melo e

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<sup>4</sup> Investigating educational initiative promoted by the Portuguese government in 1759, Tereza Fachada Levy Cardoso says that until 1765 there was no Regius teacher in Brazil (Cardoso, 2004, p. 183). It is quite possible that this statement is not correct.





Castro were appointed Regius teachers for the Captaincy of Pernambuco. Other teachers who were natural of the land, such as Francisco de Souza Magalhaes, Father Felipe Nery da Trindade and also Father Manoel da Silva joined these teachers from Portugal (Carvalho, 1978, p. 131). In 1760, Eusébio Luiz Pereira was appointed Regius teacher of the captaincy of Grão-Pará (Carvalho, 1978, p. 131). In the Captaincy of Minas Gerais, there are references to the existence of a Regius teacher for the year 1761 (Fonseca, 2010, p. 20).

Two aspects can be highlighted in the examples above. The first relates to the presence of priests among the Regius teachers, which calls for a redefinition of the ordinary statement about the secular and lay character of the Pombaline educational reform. The second issue relates to the existence of Regius teachers working in Brazil shortly after the expulsion of the Jesuits. A modest simple presence at first, which would increase in 1772, however.

The offer of regius classes in Portuguese America would expand with the initiatives taken by the State in 1772. At this date, for Brazil, the reform plan envisaged the creation of 44 classes, as follows: 12 in Pernambuco, 10 in Bahia, 7 in Rio de Janeiro, 7 in Minas Gerais, 3 in São Paulo, 3 in Pará, 2 in Maranhão. The basic literacy classes added up to 17, against 15 Latin Grammar, 3 Greek, 6 rhetoric and 3 philosophy (Cardoso, 2004, p. 185). Through these data, it is possible to see a concentration of classes in the northeast and southeast of the Colony, more economically developed regions, which concentrated the majority of the population. Another aspect that is found in this drive of nationalization of education is a significant supply of secondary level classes, which, as pointed out before, corresponded to the Enlightened Pombaline project of a more technical instruction. The addition of classes made in 1773 broadened the picture by assigning to Minas Gerais two more classes in the county of Rio das Mortes, one Latin Grammar and another basic literacy.

According to Laerte Ramos Carvalho, what was fixed for the Portuguese America in the Plan of 1772 was only materialized and, perhaps, exceeded during the reign of Dona Maria I [Queen Mary II].<sup>5</sup> Returning to the data presented by Luís dos Santos Vilhena in his *Carta Oitava da Recompilação de Notícias Soteropolitanas e Brasílicas...*, Carvalho shows that in Bahia, Sergipe del-Rei and Espírito Santo there were at least 42 Regius teachers acting between the years 1795 and 1797 (Carvalho, 1978, p. 135). A significant number, which would probably not be replicated in other locations of Brazil, however. At the turn of the century, the Governor of the Captaincy of São Paulo argued in favor of the increasing of basic literacy classes, then present in the capital, and in Santos, Paranaguá and Curitiba. In contrast to the lack of primary education, the captaincy had Latin Grammar teachers in São Sebastião, Santos, Paranaguá,

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<sup>5</sup> Indeed, Rogério Fernandes found that at the beginning of the government of D. Maria I 67% of the positions were occupied, against 33% in 1773 (Fernandes, 1994, p. 78).

Mogi das Cruzes and São Paulo, where the subjects of rhetoric and rational and moral philosophy were also taught (Silva, 2009, p. 205).

In general, we can say that in the reign of Queen Mary I the teaching of basic literacy expanded, in a reorientation of the educational provisions previously established in the reign of her father, King Joseph I.<sup>6</sup> To achieve the intent of increasing elementary teaching, Queen Mary I called upon the aid of the Church. The so-called “conventualization of schooling” broadened the opportunities of the Church, since it was recognized as essential to the education of the young (Fernandes, 1994, p. 78). As remarkable as the religious reorientation in the reign of Queen Mary I was, the state would not cease to regulate, finance and monitor teaching. The nationalization and centralization of education were guaranteed by the control exercised by the *Real Mesa da Comissão Geral Sobre o Exame e Censura dos Livros* [Royal Board of the General Commission on the Examination and Censorship of Books] and later by the reformed University of Coimbra, among other things. In fact, to Rogério Fernandes the control exercised by the University on teaching represents the “full recovery of Pombalism without Pombal” (Fernandes, 1994, p. 114).

The arrival of the royal family in Brazil brought structural and administrative demands that required a committee of agents minimally trained to deal with writing. Promoting and expanding teaching in Portuguese America was a way to ensure human resources for the various branches of the government. For the privileged sectors of society, the presence of the court in Brazil and the opening of the ports could mean unprecedented opportunities for job, enrichment, and social climbing. As a reflection of these conveniences, the newspapers of Rio de Janeiro announced the offer of private tutoring in several areas of knowledge, including English and French, for boys and girls (Silva, 2004, p. 137). As for public education, during the reign of D. João VI [King John VI], 120 teachers were appointed, while around 30 or 40 were retired (Villela, 2010, p. 100). Following his mother's steps, King John VI contributed to the expansion of the number of classes fixed in the Plan of 1772.

In 1822, after the independence of Brazil, significant changes in the educational policy, which remained state-owned and centralizing, were not noticed. The law of 15 October 1827 reaffirmed the importance of basic literacy for the Brazilian national project. The same law determined the teaching of basic literacy for all free citizens “in every town, village, and more populous places of the Brazilian Empire”. The Brazilian Imperial State only changed

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<sup>6</sup> According to Ana Cristina Araujo the classifications of the Enlightenment in Portugal, in terms of “Joanino (King John's) Enlightenment”, “Pombal's Enlightenment” and “Viradeira” is incongruous, because it perpetuates an ideological view of the “liberal and republican historiography about Pombal, as it obscures the brightness and the range of numerous and important cultural events prior to Pombal” (Araujo, 2003, p. 18).



the centralized model with the Additional Act of 1834, when the provinces came to take care of school education.

In summary, it can be said that the nationalization of school education marked the Luso-Brazilian academic world indelibly between the years 1759 to 1834. Minister of King Joseph I, Sebastião José de Carvalho Melo (The 1º Marquis of Pombal) inaugurated an official educational system, monitored and directed by the State. Despite its all-embracing nature, the state schooling addressed different parts of the Portuguese Empire differently. The limited and unequal distribution of public education together with the various demands and local characteristics did not exclude the private teaching opportunities, let alone the presence of priests among teachers. Even after the Pombaline reform, religion and catechisms continued to compose the curriculum of basic literacy.

Therefore, the irrefutable presence of religion and religious teaching asks that one put into perspective the secularizing character attributed to the reforms promoted by the Marquis of Pombal. The partnership between the Church and the Portuguese Crown suffered setbacks, the Jesuits were expelled, relations with Rome were shaken, but no secular State was established and education continued linked to religion and dependent on the priests. The Church would count on favorable conditions to expand its influence in the reign of Queen Mary I. The so-called “conventualization of schooling” tends to weaken in the following governments, without education having left the religious orbit.

The secularization of education meant, thereby, the recognition of the education usefulness for the Portuguese State imperatives that aimed at modernization. For this reason, the Crown created teaching inspection instruments, established educational guidelines and promoted the organization of a school system funded and regulated by the State. This secularization did not result in the removal, from the teaching profession, of clergymen and priests, whose presence in schools was more significant in the localities where there were seminaries and/or where the settling of regular religious orders were allowed. But what would be the case of Minas Gerais, where the regular orders had been forbidden to settle down? What would be the school presence in this region of great economic power at a global level? What would be the profile of the teachers at the headquarters of the Minas Gerais bishopric? Would the presence of priests and clergy among teachers be strong?

LITERATE MINAS: THE TEACHING PRESENCE  
IN THE CAPTAINCY AND THE PROFILE OF THE TEACHERS  
IN THE CITY OF MARIANA

The captaincy of Minas Gerais was distinguished in the Portuguese Empire by gold mining and diamond production, which, although having indicated a downward trend in the mid-eighteenth century, served to create internal markets, to agriculture, to the Royal Treasury, and to the dynamics of a “world economy” (Maxwell, 1995; Vieira, 2010). Indeed, compared to the economic relevance of the entire region, a need for the establishment of administrative bodies and structures, which were intended to regulate and exploit the richness and the peoples, was imposed. Crucial to the administrative action, the dissemination of writing, even if limited to certain social groups, should be encouraged through the promotion of school education.<sup>7</sup>

In the Captaincy of Minas Gerais, the city of Mariana was distinguished by a diverse economy, driven by the significant populational influx, which was motivated by gold mining (Carrara, 2006). To take care of administration and justice, besides the Town Council [Senado da Câmara], common to all Portuguese villages, Mariana also had a *juiz de fora*—a judge appointed from another region—, at least since 1732. Appointed directly by the king, the *juiz de fora* was an educated lawyer responsible for making justice in the first instance, which, hopefully, would be the most faithful to the laws of the kingdom. Elevated, in 1745, to the post of City, in order to house the headquarters of the bishopric, Mariana had a court of ecclesiastical justice, responsible for investigating the crimes under its jurisdiction throughout the territory of the bishopric of Minas Gerais. For these and other reasons, Mariana had a more complex administrative structure than most villages of Portuguese America.

Doctrinal watch and daily pastoral obligations were added to the legal regulatory role played by the seat of the bishopric. To care for the flock of the faithful, Friar Manuel da Cruz founded in Mariana the *Seminário da Boa Morte* [Seminary of Our Lady of Good Death], for the training of clergy and the education of the young. Under the care of Dean José Nogueira, the seminary started its activities in 1750. Dean and professor of moral theology and Latin, Nogueira belonged to the Society of Jesus (Selingardi, 2007, p. 99). This peculiarity is important because, in order to avoid any diversions of gold, the

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<sup>7</sup> Restricting the analysis to school knowledge does not disregard the existence of alternative ways of transmitting knowledge. Thus, one can think of a kind of teaching related to mechanical trades, which, in the eighteenth century, would be more tied to a practical knowledge, rather than a theoretical and written knowledge: “as well shown in societies without writing or schooling (...) numerous ways of thought and action—and often the most vital ones—pass on the practice by means of practical and totalized propagation, consolidated in the lasting contact between the one who teaches and the one who learns (“do as I do”)” (Bourdieu, 1996, p. 35; translation my own).



circulation of regular priests and the establishment of religious orders was prohibited in the Captaincy of Minas Gerais. Thus, the license for the Ignatian priests to teach at and manage the *Seminário da Boa Morte* in its first years of operation depended on the *benelácito régio* [royal approval], which could only be achieved through Friar Manuel da Cruz, the bishop of Mariana (Rodrigues & Souza, 2007, p. 288).

As presented, in 1759, by royal order, the Jesuits, active catechizers and educators, were expelled from the Portuguese dominions, causing losses in the teaching of some towns of Portuguese America. The impact of the expulsion of the members of the Congregation of St. Ignatius was also felt in Minas Gerais, although to a lesser degree, given the aforementioned prohibition of the establishment of regular religious orders. In Curvelo, Sabará and Mariana, supportive priests and “hidden Jesuits” promoted seditions, instigated, among other reasons, by the dissatisfaction caused by the persecution of the Society of Jesus (Catão, 2007, pp. 669–670). Another negative effect of the expulsion of the Jesuits was felt in the *Seminário da Boa Morte* with the removal of a few Jesuits who were responsible for the education, management and regulation in the early years of the Seminary.

The prohibition of the establishment of regular orders did not include secular priests, since these did not organize themselves in orders, which were potentially dangerous to the royal authority in an economically strategic region. The administration of the sacraments and religious life depended on these men; therefore, the formation of a body of priests and secular clergy was soon indispensable to the bishopric, and it was possible thanks to Seminary in Mariana and to the College of Caraça, which began operating in the region of Catas Altas in the 1820s.<sup>8</sup> These religious colleges contributed to the cultivation of literacy and of the Catholic faith in Minas Gerais, and especially in Mariana. Despite the prohibitions and changes arising from the royal projects, the Church and the secular clergy were primordial for the schooling in Mariana. In this city, the secularization promoted by the reforms of Pombal had to adapt to contingencies and relied on the available local resources, which even led to the incorporation of clerics in the royal classes.

As presented, the Plan of 1772 appointed 44 courses of royal classes for Portuguese America (Gouveia, 1993, p. 422). From this lot, seven courses were destined to the Captaincy of Minas Gerais: Four basic literacy classes—located in Mariana, Villa Rica, São João del Rey and Sabará—, and three Latin Grammar—located in Mariana, Villa Rica and São João del Rey. The change in 1773 increased this number in one basic literacy class and another Latin Grammar, intended for the county of Rio das Mortes. This number was further extended over the years and, in 1814, Minas Gerais had 46 classes, 34

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<sup>8</sup> The monastic house founded in the second half of the eighteenth century was dedicated to Our Lady Mother of Men and became a college in 1820.



basic literacy and 12 Latin Grammar (Fonseca, 2010, p. 23). To this set, a rhetorical class was also added, and another philosophy, both in the city of Mariana, coming, in the end, to a total of 48.<sup>9</sup>

In addition to the mentioned royal classes of philosophy and rhetoric, whose existence was no longer linked to the bishopric, the district of Mariana, in particular, had 6 classes of basic literacy and 2 Latin Grammar (Fonseca, 2010, pp. 33-34). The total of 10 royal classes in Mariana might not be enough to meet the demands of the district, but it was still higher than the 3 classes that were established in the district of Vila Rica, which was the head of the county and government headquarters of Minas Gerais.<sup>10</sup> If in Mariana the public school classes were insufficient, the situation for other locations of the Minas Gerais Captaincy did not seem to be more auspicious.

The nine existing royal classes in Minas Gerais in 1773 were not, in fact, a considerable contingent to deal with the massive population of free, white, brown and black men and women, who, in 1786, would add up to over 188,000 inhabitants. Considering only the free population, there were 26,000 inhabitants per teacher on average (População, 1899). According to the *Relação das Cadeiras dos Professores Régios...* [List of Classes of Regius Teachers...] made by the president of the Royal Exchequer, Luiz de Vasconcelos e Souza, in the first decade of the nineteenth century, there were 48 classes in Minas Gerais, but only 25 were active (Dados, 1902). At this time, the population of free, white brown and black men and women was around 280,000. Weighing these numbers, the ratio of staff to free inhabitants would be one teacher for every 11,000 inhabitants. Such quantities did not leave room for any verdict other than a massive lack of teachers in the illiterate hinterland of Minas Gerais.

However, for an accurate evaluation, it is necessary to consider the population in an age suitable to attend classes of basic literacy and Latin Grammar, which were, on average, people between 7 and 15 years old. The difficulty of this approach lies in the need to know the age of the population in a period in which censuses were rare and undetailed. There are, however, some records that allow us to estimate the composition in certain locations. In the Furquim parish, which was part of the district of Mariana, Thaís Nívea de Lima e Fonseca counted a population of 4.503 people in 1798, of whom 300 were schoolchildren (Fonseca, 2010, pp. 31-32). From this set, it is not clear how many were free, let alone who could benefit from the “school privilege”. If the difficulties of childhood condition of the time and region are

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<sup>9</sup> From a detailed study of various sources, Fonseca observed that the *Relação de 1814* [List of 1814], although made by the *Junta da Fazenda de Minas Gerais* [Board of Finance of Minas Gerais], incurs a series of errors. For example, it shows as vacant positions that were occupied and omits teachers whose names were on the payment lists (Fonseca, 2009b, p. 73).

<sup>10</sup> One of the elements that can help explain this difference is the size of the districts, and the district of Mariana was much bigger than that of Vila Rica. However, when all the Captaincy of Minas Gerais is considered, the county of Vila Rica, composed by the two mentioned districts, would have the greatest number of Regius classes, followed by the county of Rio das Velhas.



considered, and the significant amount of the number of slaves is taken into account, the only Regius teacher of Furquim would surely have much less than 300 students.

Despite the difficulties to precise the school demand in Minas Gerais, it is possible to build an expanded panel of royal teachers in the Captaincy using the official documentation. In addition to the already known *Plano de 1772* and the *Relação de 1814* [List of 1814], the *Livro de Assentamentos dos Professores Régios da Capitania de Minas Gerais* [Book of Records of Regius Teachers in the Captaincy of Minas Gerais] brings significant data for the period from 1774, when records began, until 1807, the latest date identified in the document. The teachers registered in the *Livro de Assentamentos* had their provisions transferred between the years 1774 and 1797 (Arquivo da Casa dos Contos, I-26, 3, 14, n.5). In the *Livro de Assentamentos* it is possible to identify 61 Regius teachers working in Minas Gerais, and 16 only for the district of Mariana.<sup>11</sup> Among the registered royal teachers, most were basic literacy teachers, which could have been motivated by local demands and by the appreciation of primary education of the reign of Queen Mary I. The fact that a huge number of teachers were licensed in the 1780s and 1790s contributes to this hypothesis. For the sake of the argument that has been made on the secularization of education, another element should be highlighted in the examined documentation: from the set of teachers registered in the *Livro de Assentamentos*, 32 clergymen were priests. This incidence indicates the inclusion of the Church in the school environment created and supervised by the State. At least in the eighteenth century, the Church remained considerably responsible for school education, despite the Pombaline reform and despite the restrictions on the presence of regular orders in Minas Gerais.

Going further than the records that address exclusively the Regius teachers, the analyses of a diverse scope of documents allowed the identification of several private teachers who taught at the district of Mariana. In total, for the period from 1750 to 1834, 149 teachers were nominally identified, among Regius and private and/or public teachers who were not employed by the State.<sup>12</sup> From this set, it seems, 24 entries are of students mistakenly enrolled as teachers. Excluding these individuals, there were 125 teachers placed at the district of Mariana alone. It is likely that this number was not enough to address the entire school-age population of the district,

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<sup>11</sup> Thais Nívea de Lima e Fonseca identified 261 Regius teachers working in Minas Gerais between the years 1772 and 1834. The county of Villa Rica stood out among the others, with just over a hundred Regius teachers, most of them appointed between the years 1814 and 1834 (Fonseca, 2009a, p. 74). In the district of Mariana, for the period between 1772 and 1814, among teachers of basic literacy and Latin Grammar, the author identified 10 substitutes, 2 full professors by appointment and 5 others without definition of status (Fonseca, 2010, pp. 64–69).

<sup>12</sup> Several sources were used to identify such teachers, such as civil and ecclesiastical lawsuits, post-mortem inventories, wills, *testamentários*, nominative lists, mail from the Mariana Town Council, *De Genere et Moribus* actions, marriage actions etc.

but, undoubtedly, that number exceeds estimates when considering only the Regius classes.

For the eighteenth century, the research identified 48 teachers, 24 of whom were Regius. It is worth noting that in the *Livro de Assentamentos* 16 Regius teachers appear, eight less than what was found in our survey, which scanned a larger set of documents. Obviously, the number of Regius teachers exceeded that of the classes available for the district of Mariana, because more than one teacher would teach those classes during the addressed period. This movement was due to death, to the change of teachers or even to the time limits fixed by the competent bodies for the teaching license of each Regius teacher.

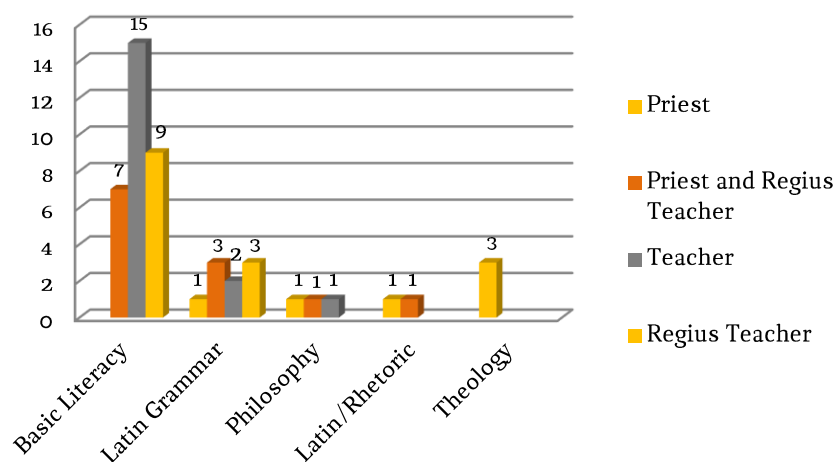


Figure 1. Teachers of Mariana 1750-1800 (Various sources<sup>13</sup>).

The graph shows a concentration of teachers in the teaching of basic literacy followed by Latin Grammar, a trend that continued in the first decades of the nineteenth century. Other areas of knowledge such as philosophy, rhetoric and theology are also represented and include a secondary training also offered by the *Seminário da Boa Morte*. The layout of these classes turned Mariana into a free preparation center for university education and ecclesiastical training. Because of that, there is the presence of 19 (39.5%) priests among the analyzed individuals. In addition, perhaps due to their careful training, clerics accounted for slightly more than half of the 24 identified Regius teachers. The representation of these religious among private teachers was more modest, adding up to 7 individuals only. Was it as seminary teachers or as Regius teachers, clerics took on the teaching of more complex subjects, which required a more careful education than basic literacy, as shown by the cases narrated below.

<sup>13</sup> Look note 12.





In Mariana, among the school subjects offered by the Church and the State, there was philosophy, a branch of science that gained prominence and Enlightenment outlines with the Pombaline reform. The subject was taught, at the seminary, by Canon Luiz Vieira da Silva and, in the city, in houses close to the Cathedral of Our Lady of the Assumption, by Father Francisco de Paula Meireles.

Both priests had well provided libraries, teeming with Enlightenment authors. The list of books belonging to Meireles reveals his affinity with the Pombaline guidelines and with the training he received inside and outside the University of Coimbra. In Portugal, Meireles was even prosecuted by the Inquisition because of his unconventional ideas. According to the complainant, Father José da Purificação Ferreira, who would be a teacher of Rhetoric in Mariana, Meireles “uttered fearful ideas about sin and concubinage” (Fonseca, 2009b, p. 95). This most controversial facet of Meireles was not strongly expressed in his library, which consisted of 280 volumes and 94 titles. In it, few were the banned authors and many the ones sanctioned by the Pombaline censorship, such as Heineccius, Genovesi, Linnaeus (Antunes, 2011, p. 135).

Although he never left Brazil, Canon Vieira had books by Enlightenment authors, some of them banned from the Portuguese Empire. The works of Voltaire, Mably, Diderot, Robertson, Montesquieu etc were present in his library (Frieiro, 1981). Canon Vieira became known in history because of his participation in the *Conjuração Mineira* [Minas Gerais Conspiracy], which planned to take the government of the Captaincy of Minas Gerais and declare independence from Portugal. For Kenneth Maxwell, Vieira composed a group of scholars that devised the regiment of the Republic the *inconfidentes* (revolutionaries) dreamed of (Maxwell, 1995).

There are indications that Meireles, although Regius Professor, coveted the position held by Vieira in the Seminário da Boa Morte. In 1788, Meireles was accused of attempting against the life of Faustino Soares de Araujo, a mechanical trader who worked as a saddle maker. After exchanging several insults with Faustino, Father Meireles would have shot Faustino’s store, grazing him in the arm. The case witnesses reported not only the aggression status, but also brought some valuable information about the nature of the author of the attack. One of these witnesses admitted having heard Father Meireles threatening to break the legs of Canon Vieira and take his teaching position in the seminary of Mariana. A year later, Vieira was accused, arrested and deported for having participated in the *Conjuração Mineira*. Despite the incident, Meireles failed to hold the position of teacher of philosophy of the Seminary, and died in 1794 (Antunes, 2011, pp. 137-138).

The examples of Meireles and Vieira give more concreteness to the profile of Regius and clerical teachers of Mariana. People with extensive knowledge, large libraries who were willing to question the order of the Church and the State that had educated them and that gave them financial support. Even embracing

God and the Church, these religious would not fail to engage with mundane aspects, whether in everyday conflicts, or in higher dreams of sedition. It is important to bear in mind that schooling would paradoxically provide discipline and sedition. But, after all, would the Portuguese Enlightenment not be paradoxical? Does not the very secularization of education of the Pombal times reveal something peculiar about the Portuguese Enlightenment?

Indeed, the presence of religious noticeable in the above graph allows us to put into perspective the secularization of education in the years after the Pombaline reform. This, however, does not imply that the reform had no effect in Minas Gerais. Actually, it was by the hands of priests such as Meireles that part of the Pombaline Enlightenment was spread through Minas Gerais.

In the nineteenth century, the presence of priests tends to attenuate, but it is still significant, especially because in the first decades of this century the College of Caraça starts to operate. The data collected by the research are not yet fully consolidated for this period. In part, the inaccuracy of the data is due to the incomplete records of the sources, which require more attention from the researchers. For example, the nominative lists investigated are sometimes obscure as regards the areas of expertise of teachers. Other times, students were registered as teachers. This is the case of 24 students of the College of Caraça, between 11 and 20 years old, appearing in a Nominative List of *Catas Altas* from 1822 as teachers. If these cases are overlooked, the total number of teachers identified for the period between 1750 and 1834 will be 125, as noted before.

The teachers included in the records of the nineteenth century totalize 77 individuals, being 28 Regius teachers, together representing 36.36% of the total teaching staff.

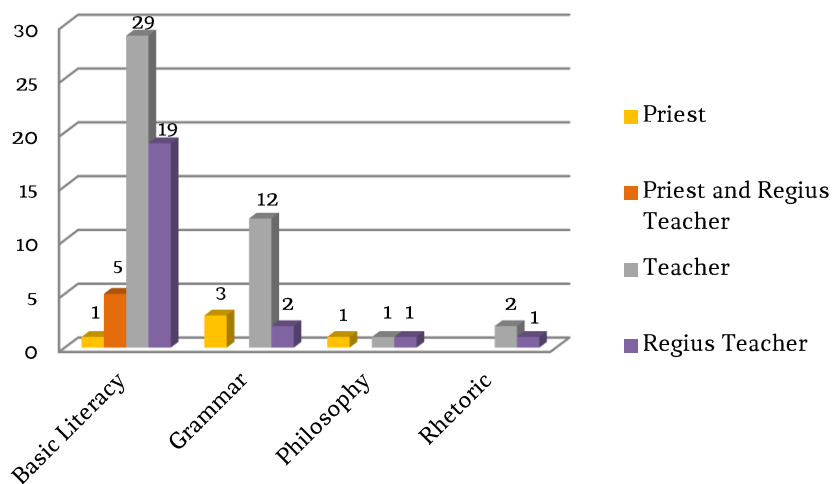


Figure 2. Teachers of Mariana 1801-1834 (various sources).



It is noticeable on the graph that the presence of clergymen and priests is proportionally smaller than the presence of lay teachers. It is possible that this disparity be associated with the history of the *Seminário da Boa Morte*, which was closed between 1811 and 1820. After that, the numbers of clergymen tend to increase, especially because classes were opened in the College of Caraça. However, the contribution of these institutions to the Mariana teaching staff took a while to be seen and would not be represented in the graph above. In any case, priests were still present among the teachers of grammar, philosophy and basic literacy, but not to the same extent as that of the previous century. Another explanation for this low representation can be found in the asseveration of the secularization of schooling initiated in the ministry of Sebastião Carvalho, confirming the effects of a “Pombalism without Pombal”, to use the aforementioned expression used by Rogério Fernandes.

Close to this picture of doubts, a caveat about the preponderant number of private teachers of basic literacy must be made. It was not always possible to determine whether the teacher registered in the documentation was basic literacy or Latin Grammar. In part, this uncertainty can be attributed to the naming changes that happened in the nineteenth century. According to some authors, in the eighteenth century, there was a clear distinction between “professores” [teachers] and “mestres” [masters/professors]. “Mestres” would be responsible for the most fundamental teaching of reading, writing, counting and the Christian doctrine, while “professores” took care of the more specialized education, such as Latin Grammar. This distinction tends to reduce in the nineteenth century and the term “professor” would also be used for the teaching of “basic literacy”.<sup>14</sup> Thus, in the documents, references to “professores” without further elaboration were allocated in the “basic literacy” category, which could explain the great presence of these teachers.

Altogether, there were 28 Regius teachers teaching in the district of Mariana between the years 1801 and 1834, including one woman. Licensed in 1833, Francisca de Paula Egina was the only woman among the studied Regius teachers, which reveals a predominantly male teaching universe. There was an effort of the Brazilian Empire to include women in the public school system. The law of 1827 defined that the most populated villages should have a teacher to teach the girls “to read, write, the four operations, the Christian doctrine” and also “as prendas, que servem à economia domestica” (“the *prendas*, skills that serve the domestic economy”) (Arquivo Histórico da Câmara Municipal de Mariana, livro 719).<sup>15</sup> According to the same law, the teachers would be appointed by the Presidents of the Provinces [Presidentes

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<sup>14</sup> In the nineteenth century, more precisely in 1822, the Regius classes were renamed as public classes, which was considered in the survey.

<sup>15</sup> Arquivo Histórico da Câmara Municipal de Mariana — AHCM [Historical Archives of the City Council of Mariana] Book 719.



das Províncias] and should be “Brazilian, known to be honest, and prove to have much knowledge in tests applied” (Arquivo Histórico da Câmara Municipal de Mariana, livro 719). Despite the legal requirement, the case of Francisca Egina and the reality of education in Mariana reveal the discrepancy between the legislation and the school routine. A document issued by the Town Council of Mariana [*Câmara de Mariana*] in 1828, to the President of the Province indicates the difficulties in meeting the shortage of female teachers:

It is not possible for the Council to inform Your Honor about the establishment of the Girls’ Schools for we could not find enough ladies to be teachers so we can only remind Your Honor that the deceased Surgeon Mor Mr. Domingos Ferraz Chaves's daughters or the late Lt. Narciso Gomes’s daughters (...), Lescadia and Narcisa could serve this city. (Arquivo Histórico da Câmara Municipal de Mariana, livro 719)

In the same year, another record of the Town Council of Mariana mentions the creation and maintenance of schools for both sexes in the localities of “Piranga Pomba, Sumidouro, Barra Longa, Mercês, Presídio, Furquim, Ponte Nova, Catas Altas, and Santana dos Ferros” (Arquivo Histórico da Câmara Municipal de Mariana, livro 719). Despite the evidence, there was no longer any supporting documentation of the actual installation of these schools. What is certain is that Francisca Paula Egina was the first female Regius teacher of the city of Mariana.

## CONCLUSIONS

Early in the Pombaline reforms of education, in 1759, it is possible to perceive the existence of Regius teachers in the Portuguese America. It is likely, however, that these teachers were insufficient considering the scarcity expressed in constant complaints from the authorities. This situation, however, has been shown to be more complex as the regional researches advance. While some studies have shown the absence of Regius and private teachers in captaincies of the interior of Brazil, such as São Paulo and Mato Grosso, others bring more promising information about coastal regions, especially the Northeast. These indications, however, tend to improve in the last quarter of the eighteenth century, revealing positive results of the Pombaline educational reform.



Notwithstanding the changes promoted by the coeval educational reforms and subsequent to the expulsion of the Company of Jesus, the strong presence of priests was noted among the teachers. As a result of these and other data presented, the secularization policy inaugurated by the Marquis of Pombal in the reign of King Joseph I did not separate the Church from the school environment, especially in the second half of the eighteenth century, when the effects of “the conventualization of schooling” promoted by Queen Mary I were considerable.

Still, in the following century, a considerable expansion of lay teachers is noticed in the district of Mariana. This phenomenon may be the result, although diaphanous, of what Rogério Fernandes called “Pombalism without Pombal”. Nevertheless, perhaps the decay of the presence of clerics among teachers can be explained by local contingencies, involving the shutdown of the *Seminário da Boa Morte* between the years 1811 and 1820.

Finally, any conclusion that could be taken about the effects of the educational policies throughout the 1759-1834 period should consider the local specificities and contingencies, especially because such aspects served as criteria for the unequal distribution of Regius classes throughout the Portuguese empire. Furthermore, any consideration about teaching in a particular region should consider their economic, social and cultural particularities, since they directly affect the demand and the supply of schools. The recognition of this multitude of influencing factors poses a challenge to the researcher who cannot settle for peremptory statements that confirm the lack of teachers in Minas Gerais. The real challenge of the research is to expand the range of documents without fearing the effort and the difficulty of drawing the first lines of the history of school education in the Luso-Brazilian world.

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**FROM THE MEDITERRANEAN TO THE AMERICAS.  
ITALIAN ETHNIC SCHOOLS IN RIO GRANDE DO SUL BETWEEN  
EMIGRATION, COLONIALISM AND NATIONALISM (1875-1925)**

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**ABSTRACT**

Between the second half of the nineteenth century and the first decades of the twentieth century, the development of Italian educational institutions has been associated with new processes. The needs related to the formation of Nation-State, widen and intertwined with those determined by new phenomena as the colonialism and massive emigration. Millions of Italians crossed the Mediterranean to reach the coasts of the Americas: there arose new colonies of immigrants. The dynamics that involved the Italian society have requested schools to take on new and relevant functions for the basic education of citizens in the states of emigration and in those of colonization. The essay presents the case study of Italian ethnic schools abroad: it aims to examine the functions performed by institutions and school cultures—by textbooks—used to ensure the preservation and the promotion of specific educational models by ethnical and identity characteristics in a national sense in a different context, like the Brazilian State of Rio Grande do Sul.

**KEY WORDS**

Italian migration and education in Brazil;  
Educational policy nineteenth and twentieth century; Italian ethnic schools in Brazil;  
Educational culture and Italian schools abroad.



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# From the Mediterranean to the Americas. Italian Ethnic Schools in Rio Grande do Sul between Emigration, Colonialism and Nationalism (1875-1925)<sup>1</sup>

*Alberto Barausse*

## INTRODUCTION

In its various forms, transnational mobility is among the most significant processes of recent contemporary history. The educational dynamics that followed these processes constitute a very fertile field of research, allowing us to investigate the development of the multicultural society and of the internationalization of relationships. By using conceptual tools that recent cultural history has made available, we can verify how the educational processes have helped to perpetuate or to create new forms of identity. In this perspective, the study presents partial results of a research project on the history of Italian ethnic schools in Brazil, aiming to both illustrate how the schooling processes were set in motion and to study the schooling practices and knowledge in a specific context, the one of Rio Grande do Sul between the second half of the nineteenth century and the first decades of the twentieth century. The understanding of the school processes and the formation of identity processes among Italian immigrants and their descendants is relevant for the comprehension of the plurality of school initiatives in Brazilian, as well as in Italian, History of Education. The process of international mass mobility has involved large groups of Italians from the second half of the nineteenth century and, as it is well known, while on one hand it suited the projects of the Brazilian aristocratic classes of finding alternative solutions for the replacement of workforce after the abolition of slavery, on the other hand it also suited (Franzina & Sanfilippo, 2003) the desire of the Italian elites of ensuring alternative options for the poor classes who were facing problems linked to the country's socio-economical lagging and to specific stages of crisis. In this text the focus will be placed in Rio Grande do Sul, first as an imperial province then as a State, which makes it a singular case in the context of the Italian communities abroad. During the period in review, the southern state of

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Brazil was characterized—more than any other State—not only by episodes of rebellion and wars, but also by a fairly strong migratory phenomenon with very specific characteristics, absorbing high numbers of immigrants in their territorial occupation, such as Portuguese (namely Azoreans), Germans, Italians, and Poles (Pesavento, 1980). One of the Brazilian states that most received immigrants, in the case of the Italians the majority emigrated between the end of the nineteenth century and first decade of the twentieth century, occupying colonies and urban areas such as the state capital (Rosoli, 1993). These immigrants built schools linked to their ethnic belonging, i.e., Italian ethnic schools. Many of these schools were subsidized by the Italian Government through a consular network which provided school supplies (mostly books) and, at times, financial contributions. These learning spaces ensured a process of education that aimed to spread the feeling of Italian identity. This feeling was brought back after the end of the First World War and, with the fascist reforms, was reinforced from the end of the 1920s and the beginning of the 1930s.

As part of the suggestions offered by the historiographic advances in the field of education (Julia, 1996; Sani, 2011; Viñao Frago, 1998) these contributions are intended to meet some advanced thesis on the cultural history. The empirical verification is based on the analysis of the archival documents preserved at the diplomatic historical archive of the Foreign Ministry.

#### THE MIGRATORY MOVEMENT IN SOUTH AMERICA AND THE CRISPI REFORM OF ITALIAN SCHOOLS ABROAD: “HEARTHSTONES OF NATIONAL EDUCATION AND PATRIOTIC SENTIMENT”

The inauguration of a new emigration policy and the reorganization of Italian schools abroad were part of the framework of the complex project of Crispi, who intended to build a strong State and a foreign policy of power (Duggan, 2000; Levra, 1992). The modernization of the diplomatic policy of Italy under the leadership of Francesco Crispi, Prime Minister and Minister of Foreign Affairs at the time, aimed at an approximation with the emigrants. The law 5866 of December 30th, 1888 stated that Italy should not lose sight of its emigrants, but on the contrary should follow them in the “new nation”, tutoring them. The nationalism of Crispi considered immigration as a power factor for the expansion of Italy also in terms of trade relationships (Salvetti, 2002), and the reorganization of schools was placed under the wider national and civic revival of education that would



pivot on patriotic values and on the construction of a collective imaginary based on the cult of the homeland. The presence of educational institutions abroad assumed different aspects depending on the countries of destination of the migratory flows. As it is known, the Royal Decree No. 6566 of 1889 approved the planning of Royal Italian Schools (common in the Mediterranean area) and of the Italian schools abroad. This regulation established the direct and immediate management of educational institutions as a duty of the Italian State, stating the secular nature of education and establishing grants for elementary schools run by associations and by individuals, as well as providing for the possibility of opening subsidized schools for secondary education. It was a period in which the budget for education subsidies increased. The objectives set by the new reorganization law were pursued through the distinction between government schools and subsidized schools with funding provided by the ministries and managed by the consular authorities (Ciampi, 1998; Floriani, 1974). Given their orientations as “hearthstones of national education and patriotic sentiment” (Damiani Circular, Italian schools in the American colonies. Circular of the Undersecretary for Foreign Affairs Abele Damiani, in the Ministry of Foreign Affairs, Annual report of the ethnic schools for financial and school year 1899-1890, p. 207), the schools to be established overseas had to comply with the governmental programs, appropriately adjusted for their specific geographical circumstances. The newly unified Italian foreign policy also included, from 1870 on, the administrative competence of the Italian schools abroad. From then on, the consular structures were responsible for the organization, promotion, inspection and systematization of schools. There was a prospect of regulating and establishing the teaching program and the textbooks that would be used, as well as to perform inspections to verify the school operation.

THE DEVELOPMENT OF SCHOOLS IN RIO GRANDE DO SUL  
IN THE END OF THE NINETEENTH CENTURY  
AND IN THE BEGINNING OF THE TWENTIETH CENTURY:  
THE VIEW OF THE ITALIAN CONSULAR AUTHORITIES

The first forms of schooling for Italian migrants came to light in the first fifteen years of colonization, during the last phase of the Brazilian Imperial Regime<sup>2</sup>. Researches on its causes have been pointing to an increase of

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2 The birth of the Italian colonial area was a consequence of the reestablishment of the colonization policy of the Imperial Government after the failure of the previous colonization policies of the Province. In 1875, the Imperial Government engaged in promoting and populating the colonies of Conde D 'Eu and D. Isabel, already demarcated,



preliminary need for education, besides indicating the need for further research to investigate both the literacy levels of the immigrants and the levels of school attendance (Luchese, 2014a). These questions are even more important in the light of the considerations set out by the consular authorities, who routinely informed the Foreign Ministry on the development of the schools. During this period schools were established in both rural and urban areas in order to deal with the poor dissemination of Brazilian schools in the region. Luchese has documented the difficulties brought by the delay in the development of primary education in the colonial area of the imperial province of Pedro II of Brazil and the complexity of its causes, not only due to the shortage of eligible teachers and the deficiencies among the existing ones, but also because of the difficulties of running the inspection services, in a context of poverty and ignorance (Luchese, 2015). This situation continued despite the law ruling the occupation of the colonies, which, according to a Regulation from 1867, provided for the establishment of schools as a public service; improvements in the organization of the public educational system were attempted with a new law of 22 February 1876. The first schooling initiatives, at the beginning of the experience of Italian immigration in Rio Grande do Sul, were supported by the colonial administrations. In this first period, extending at least until 1883, the teaching assignments were given to the migrants with more education. The fact that the classes were performed in (Venetian) dialect soon aroused serious concerns in Brazilian authorities about the emergence of new generations of Brazilians completely alien to the culture and the language of the country. These were the reasons for a first assignment of public teachers of the Portuguese language in 1883, still restricted in number (Luchese, 2015). In order to overcome the deficiencies of the public education system, other policies came to pass. Luchese has verified, from 1884 on, a more intense participation of the mutual aid society initiatives, by firming contracts with teachers and by using the aid of the consular authorities for the acquisition of school supplies. How long did these initiatives last? Luchese mentions ephemeral initiatives (Luchese & Kreutz, 2010). The economic crisis that had reached Brazil in the second half of the eighties, motivated by poor harvests and limited communication resources, emphasized the difficulties of the settlers in providing autonomous resources for the ethnic schools (Report of Consular Agent Petrocchi, 1909). In face of this situation, the commitment of the consular authorities and the increase in the resources for the

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and in the foundation of a third colony called "Fundos de Nova Palmira", (later called Caxias) whose boundaries were defined by Campos de Cima da Serra, and by the colonies of Nova Petrópolis, Nova Palmira and Picada Feliz. Two years later, the Imperial Government created a fourth colony to accommodate new immigrants who arrived in the province. This colony was called Silveira Martins and it completed the initial basic center of Italian immigration in Rio Grande do Sul. The Imperial Government had arranged for the installation of agricultural colonies in the areas specifically managed and controlled by the *Repartição Geral das Terras Públicas*. Therefore, the agricultural colonies in the northeast of Rio Grande do Sul were divided into square leagues, limited by the so called *linhas* and *travessões*.

maintenance of schools was considered positive. The intervention of the consular authorities was oriented to support the development of schools both in the urban context of the State capital and in the countryside, where the settlement of migrants was more intense. At the end of the imperial era and on the eve of the new republican phase in the history of Brazil, the province of Rio Grande do Sul had a significant presence of Italian ethnic schools. In Porto Alegre, in 1889 the presence of the Italian schools was strengthened when management by the local Mutual Aid Society began with a licensed teacher, Dionigi Ronchi, in charge for 60 students; an evening course, attended by 25 students, was also inaugurated. The Mutual Aid Society took over the initiative of a small school with a few dozen students run by a disliked teacher. In the colonial region of Caxias, however, where the consul registered the presence of nearly 20.000 Italians, there were eight ethnic schools with 314 students, counting on an allocation that amounted to 7.500 Italian lire. In the colonial area of Dona Isabel there were nine schools; however, each of them was different in terms of importance. While the evaluation of the school located in the facilities of the Charitable Society was positive, the judgment of the schools, located in the so-called “linhas”, was differentiated. The number of enrolled students was 284 and the contribution received amounted to 2.000 Italian lire. Even though less populated, the province of Conde D'Eu had eight schools, one of them under the direction of the local Charitable Society and the other seven located in the “linhas”, with a total number of 291 students and an allocation of 2.000 lire. In the colony of Silveira Martins there were three schools, subsidized with 1.500 lire and 81 students enrolled. In the colony of Rio das Antas there was a single small school of 22 students, kept by teacher Lessona, daughter of the renowned Michele, which received a contribution of 1.500 lire. The schools of Encantado had 40 students and a licensed teacher, with a subsidy of 500 lire. The schools of Pelotas, Rio Grande and Bagé were directed by their respective Charitable Societies and had together a total of 80 students; each of them received an allocation of 500 lire. The two schools of Alfredo Chavez and Serra dos Tapos were never actually opened. The allocated subsidy of 500 lire for each of these schools was redirected to cover the expenses of other schools and, at the same time, to the revision of the subsidy allocated for the schools of Rio das Antas and for the opening of a school for girls in Porto Alegre (Report of Consul Marefoschi, 1889).

The value of these schools was rather uneven. The methods employed were influenced by their specific needs: the teaching often didn't go further than the first two years of education, limiting the students to “attend school to learn how to read and write”, projecting the creation of additional classes mostly in the urban areas of Porto Alegre, Rio Grande and Pelotas, “but in the colonies it will not be easy, because parents do not send their children to school for more than two or three years”. The consul emphasized:



there is no doubt that these schools are affected by the uncertainty and instability that are characteristic of institutions maintained almost entirely by private initiative and that are supported with very limited means. The subsidy from the government is very useful in attributing to the institutions a firm aspect that allows the students to attend the same schools and follow the same courses for a certain time. This subsidy, although modest, guarantees to teachers a fixed allowance in addition to the small contributions received from students. This grant also entitles the Consulate to the opportunity and the responsibility of monitoring the evolution of these schools, through supervision, which is the only effective way of control, as it is difficult to meet people who have enough education to direct even the first class of elementary schools, especially in the colonies. (Report of Consul Marefoschi, 1889)

During the first phase of the Italian colonies in Brazil the Italian Government, through the consular authorities, tried to take profit out of the fragility of the Brazilian educational system. This is confirmed by the several reports that the consuls and vice consuls sent periodically to Italy in order to illustrate the condition and the development of schools in Brazil and, in particular, in the State of Rio Grande do Sul. The intervention of the consular authorities was ideologically connected to the need to promote the most effective ways of ensuring the maintenance of traits of national identity, starting with the language. As the Consul wrote in 1889:

The need to promote and encourage Italian schools in this part of Brazil becomes evident by the fact that there are more than 80.000 Italians here, who without this instrument would soon lose all practical knowledge of the language, the main link of attachment and of connection with their country of origin. Besides that, education is so neglected by the local government, especially in the Colonies, that in many of the Italian population centers Brazilian schools do not even exist, and the children of our settlers would grow in a state of complete ignorance without the opportunities to acquire even the first, indispensable knowledge to which they would have access in our schools. (Report of Consul Marefoschi, 1889)

The vice consul who resided in Pelotas, one of the most southerly cities in the state, underlined the opportunity to support the development of schools, especially in rural areas, where, despite of the greatest difficulties, the local state authorities were able to ensure the presence and the development of educational institutions. The observation carried out by the Vice-Consul is interesting and reveals a very special way of thinking and identifying strategies to defend and promote the national identity. In his opinion, what had proved particularly useful to this end was the spreading of schools along



with the maintenance of a certain isolation of the settler communities from the contact with native Brazilian people, given that their mixture would inevitably result in a loss of the national identity traits. This later aspect paradoxically became one of the main criteria to define the model of insertion in the state. In fact, the vice-consul wrote as follows:

According to me, having meticulously visited the colonies, there seems to be no doubt: they demand many schools, small schools though, and distributed in each “linha”. There are many arguments which I could adduce in support of my opinion; I will mention only a few that, for their value, dispose of the others: 1st the colonies occupy a vast territory; it might then be physically impossible for the children of settlers to attend a central school; each colony consists in an area of more than 100 kilometers in diameter with no means of communication; to claim that a single school was enough would be like saying that the children of Naples should go to Rome to educate themselves...! 2nd The places where schools are currently located result to be less useful: in fact a) at these locations the identity feelings are weakened by the predicted mixing with the local element; b) the progress of Italian Associations will permit that they run their schools on their own; c) the wealthiest settlers reside at the locations where they can provide for the education of their children, including those who lend themselves to teaching; 3rd In the “linhas” with the cooperation of the schools we can keep alive the national spirit on farmers, as they are not having any contact with the Brazilian people: in this perspective, we attack with greater force the weak side. (...) By promoting the language and the Italian traditions in agricultural colonies, an easy task given their isolation and the negligence of the Brazilian government, we will achieve the dual advantage, political and economic, of having large national communities supporting the mother country and, in the future, consuming our industrial products. On the other hand, in the urban areas it is usual for Italian families, after a few years of residence, to undergo a complete transformation: fostered by friendship, business relationships, marriages, by the similarities between the two native languages and especially by our natural disposition to assimilation; for this reason, Brazil prefers Italian emigration in relation to others. Why fight against this fatal degeneration? Social schools are sustained only for the official support, certainly not in order to respond to a need or a patriotic ideal. (Report of Acton E., 1890)

The first years that followed the introduction of the provisions of Crispi on Italian schools abroad have offered the opportunity of a very significant impulse in the establishment of schools sponsored by the consular authorities. The annual report from 1890-91 mentioned the presence of 33 rural schools in the ethnic area of Rio Grande do Sul alone; and even if in 1889 the





total amount of subsidies given to schools in the state was of 6.000 lire, within two years the subsidy had been increased to 15.000 lire (MAE, 1889, 1890).

The network of Italian ethnic schools also contributed to the development of education in Rio Grande do Sul from the outset of the Republic and the launch of the Constitution in 1891 until the First World War. In the new reality of the State, education was perceived as an important field oriented to the development of a progressive expansion of primary education, while secondary education remained in the hands of private enterprises. The education policy, developed by the republican positivists during the decades of the First Republic, integrated a more involving strategy and State actions took place in the form of greater interventionism in the social environment, developing a series of policies in which actions towards education increased in importance, as characterized by four aspects: the intervention of the national parliament, the actions at State government level, the mediation with the Catholic Church and the construction of a republican imaginary that intended to build up a national consciousness (Corsetti, 1998). The school became a new resource to prepare the restructuration of the society in Rio Grande do Sul according to a positivist perspective, for which education should be seen not only as an instrument to learn reading, writing and arithmetic, but should also aim at the harmonious development of body, mind and ethics. The “*castilhista*” positivist approach that supported the advance of the schooling process in Brazil was unraveled, albeit very slowly, with the birth of autonomous municipalities in the Italian colonial region of Rio Grande do Sul, such as the ones of Bento Gonçalves and Garibaldi (the former colonies of Conde d’Eu and Dona Isabel), and with an active role for the school intendant, along with those of the superintendent and the school inspectors, after the establishment of the school board in 1906. However, with the administrative centralization of the State, especially after the decree 874 of 28 February 1906, the demands from the State authorities for a greater participation of municipal intendants increased as means of expanding the number of subsidized schools and the number of classes.

In this new perspective, although in a nonlinear form, the experiences of Italian ethnic schools continued. During the first years of the new Republican State, in fact, the development of Italian ethnic schools was influenced on the one hand by the choices made by Minister Di Rudinì, which aimed at reducing the availability of financial resources to subsidize schools; on the other hand, by the absence of a genuine commitment of the consular authorities on organically supporting the development of the network of ethnic schools. The choices derived, however, from different ideological views. Pio di Savoia persisted in expressing a rather negative view on the role of the presence of Italian immigrants and on the possibility of achieving the objectives of supporting the national identity:

The Italian language has no force of expansion in the State of Porto Alegre in Brazil or in general, and I appeal to all those who have been here and have observed it. It has no force and it couldn't be different because—apart from many other considerations of a more general nature—the vast majority of the immigrants are uneducated, rough, ignorant people who do not even speak the language of Dante, but the dialects spoken in Veneto, Friuli, Napoli, Sicilia and so on. They came here driven by poverty, in search of a new homeland and to achieve all the benefits it could offer; in doing so, they need to assimilate the habits, the customs, and the language as soon as possible, earlier rather than later. In fact, after two or three months, they are already able to express themselves in the language of the country; after two or three years they don't know how to say a few words in Italian without tripping over four words in Portuguese anymore, and after a longer period they no longer speak their language. It's impossible to go against this current. (Report of Consul Pio di Savoia, 1894)

The school had emerged not exactly by virtue of attachment to their country of origin and to their language, but rather, “for the need of having their children to be supervised as they go to the field work”. At the same time, according to the consul, the same migration experience had helped the settlers to realize that “it was necessary that their children learned something, so as to be a little braver against those who know more”.

Despite the limitations of the rural schools to achieve the established objectives, the consul considered the financial support as essential, given that “while there is human solidarity, we cannot consider as wasted the money employed to subsidize schools for children of the most unfortunate people that poverty has driven from Italy”. He believed that the subsidy for rural schools had “a more philanthropic than Italian purpose, more patriotic than national, like the one that has paved the way to a feeling of solidarity among the Italian emigrant and Italy, but that does not properly point to a national interest”.

Thus, a different view on the role of urban and rural immigrant communities persisted. Those of Porto Alegre and Pelotas, according to him, “did not deserve any attention” but their schools were important mechanisms for having “a moralizing influence”.

Urban communities were marked by an immigration not related to the constraint of the property but to “crafts and small trades”, and their importance was in the potential development that they represented for the business relations. For these reasons, the economic contribution was considered important, but without plans for a more organic support: “it is not even worth thinking about laying the foundations of a real school organization [considering it is related to an excessively inconstant element], rather undisciplined, without any orientation”. According to the



consul, the financial support did not need much expansion, but the Italian government should rather

go back and do to our compatriots more than has been done so far, so it's necessary to bring back to the government contribution the characteristic it should have; which is the characteristic of a real subsidy that now finds itself completely replaced by the one of actual maintenance. (Report of Consul Pio di Savoia, 1894)

From this perspective, the consul, Pio di Savoia, performed a radical reform on the distribution of subsidies to ethnic schools in the state of Rio Grande do Sul which, according to him, had been performed in an “unwise and equitable” way. The changes were preceded by a circular note announcing the purposes of the reform on the distribution of subsidies through which all forms of subsidy in money paid up to that moment were canceled. The subsidized teachers would receive the contribution for the last time. From that moment on, the schools would receive a regular subsidy “in books, at the beginning of the school year, and a small cash prize at the end of the year”. Regarding the economic contribution, consular authorities established the financial reward of 50 lire per year, but also introduced a rewarding prize of 100 lire for the 12 schools that would be judged worthy by a special committee chaired by the consul. To obtain these contributions, the schools would have to fulfill precise criteria such as:

a) The school must have more than a year of existence; b) the teacher must be a person of recognized honour; c) the teaching shall be conducted in Italian; d) twice a year the teacher must report on the school to the consulate; e) the school year should not be less than ten months; f) the school day should not be less than three hours. (Circular Pio di Savoia, 1894)

The choices of the consul determined rather heavy consequences resulting in manifestations of open dissatisfaction on the part of the representatives of the settlers' associations, forcing the subsequent consul, Legrenzi, to press the Ministry with demands for the introduction of new measures (Report of Consul Legrenzi, 1894). Even the successor, though in the picture of a less pessimistic and negative view on the work of the colonies of immigrants, considered it appropriate to give priority to the support of rural schools, due to the persistence of strong disagreements between the urban associations of Porto Alegre and Pelotas (Report of Consul Legrenzi, 1895). The consequences of the restrictive measures were felt especially in the

second half of the nineties, leading to a significant decrease. The consul of Porto Alegre indicated to the ministry a total number of 41 schools, compared to the 57 previously reported. While in Porto Alegre and in Pelotas the schools could benefit from physical structures lent by the Mutual Aid Society Vittorio Emanuele II, in Rio Grande and in Bagé the schools had declined and disappeared. The following consul pointed to the difficulties and to the uselessness of the Italian urban schools as a tool to limit the expansion of Brazilian schools (Report of Consul Dall'Aste Brandolini, 1898).

Between the end of the nineteenth century and the first decades of the twentieth century, significant changes affecting the further development of schools in the State of Rio Grande do Sul were recorded, particularly the establishment of a larger number of schools and educational institutions with religious background. After the expulsion of the French religious congregations, the Sisters of St. Joseph of Chambéry, the Sisters of the Immaculate Heart of Mary, the Marist Brothers and the Lasallian brothers settled in the Brazilian State. These new religious congregations were joined in 1915 by the Carlist and the Passionist Priests (Giron, 1998; Luchese, 2015). All of them invested heavily in the construction of schools and seminars. Their commitment to founding schools led to the development of enhanced course offerings, including for the community of Italian migrants located in the distant colonial areas. As pointed by consul De Velutis, the French congregations were a “great competition to ours, as they freely admit poor students charging only those who can afford” (Report of Consul De Velutis, 1906). The Italian ethnic schools, however, continued to live “stunted lives” and the settlers, facing the difficulties of the economic crisis exacerbated by the scourge of locusts and drought, struggled to ensure a salary for the teachers, “who were poorer than them”. On the other hand, the contribution of the mutual aid societies seemed to be conditioned by many tensions: “They rise, they break down and decay, easily, on behalf of the energy and good will of those who run them, and according to the moods of their associates and of the conditions of their members” pointed the consul (Report of Consul De Velutis, 1906). In spite of the growth of the competition with the educational institutions created by religious congregations as well as with the Brazilian State institutions and the municipal ones—which aroused strong concerns in consular authorities—, the first decade of the twentieth century was the most significant phase of quantitative development of the Italian ethnic schools due to the increase in the allocations and to the important role played by the consular agents and by the teachers. This new configuration was already a reality during the early years of the twentieth century but it was only fully recognized, as we shall see, by the law Tittoni launched in 1910. In this year, one of the most ready consular agents, Luigi Petrocchi, sent to the consulate an updated statement of schools in the search of subsidies. There were 127 schools, out of which 17 were of confessional character, while 106 were run by the teachers. The schools



managed by mutual aid societies were 3. The schools run by secular teachers and the religious schools included a total of 5580 students (Report of Consular Agent Petrocchi, 1909).

In the second decade of the twentieth century, however, we can observe a real growth of the participation of municipalities in the Italian colonial region resulting in a development, more occasional and arbitrary than planned, of the network of subsidized schools. This period was followed by the transformation of many private isolated schools, maintained by the community with the teaching of Italian, into subsidized schools, supported by the State or by the municipalities, sometimes even becoming municipal schools in which the curriculum provided teaching also in Portuguese. In the studies produced in recent years, there are several clues and traces indicating the increasing demand for schools, by the part of the settlers towards the municipal governments, as these institutions were perceived as a form of social advancement and socio-cultural and political distinction (Luchese, 2015; Werle, 2005).

Another significant step was the creation of elementary schools according to the decree of May 1909, in which the gradual implementation of a new primary school model was provided. Up to that moment the schools in Rio Grande do Sul were organized in one class involving only a teacher and many students in different levels. From this moment on, the development of elementary schools which should have at least two hundred students and should be organized in graded series began, with students grouped in different rooms according to their levels of learning and having one teacher for each class with a single direction. In the Italian colonial region, elementary schools were established in 1910 in Bento Gonçalves and in 1912 in Caxias do Sul. In Garibaldi, however, a school group was recognized only in 1926.

The provisions of the Brazilian state were in line with those later established by the Italian political authorities which, in December 1910, promoted the Law n. 867, organically reforming the legislation on Italian schools abroad (Floriani, 1974).

## THE REVIVAL OF THE SCHOOL POLICIES FOR *ITALIANITÀ* FROM THE END OF THE FIRST WORLD WAR TO THE EARLY YEARS OF FASCISM

After the end the First World War, the programs to recover the role of Italian schools abroad and the actions promoting the language and the national culture regained strength. As part of the initiatives to support an expansion in the presence of Italian schools abroad, the Ministry of Foreign Affairs



recovered an active role through the Directorate General for Italian Schools Abroad. From 1920 on, headed by the intellectual Ciro Trabalza, the Directorate favored the redefinition of a program of action with a particular attention to the educational and cultural institutions in the Americas (Barausse, 2015).

In the period between the crisis of the liberal institutions and the first phase of Fascism, until 1925, the main concerns of the ministerial authorities were to determine the most appropriate forms of reorganization of the school system in the Americas. The goal was the development of the presence of “ethnic schools”, considered essential to promote the *italianità* and to prevent the loss of national identity traits—a phenomenon defined by experts as the “denationalization process”. In continuity with the school policies from the previous decade and mediated by the Directorate General for Italian Schools Abroad, the orientation was to provide for a more efficient didactic reorganization, to support the inclusion of teachers with a specific training, to mediate with religious authorities in order to involve Italian clergy, and to promote the collaboration of local communities through an active participation in religious associations linked to *Italice Gens*. While considering the conclusions of a mission carried out between 1922 and 1923 in southern Brazil, the head of the commission specified:

1) that the Italian government promotes in the country, and specially in the regions from which the emigration to Brazil was more intense, the education of teachers prepared to work in those lands with a specific cultural program. 2) that, at the same time, a project of primary education for our colonies in Brazil is to be developed, which will give our distant schools efficiency both in the properly didactic field and as in the more dignified field of the conservation of the national soul 3) that among the conditions posed by Italy to assure the Italian identity of those emigrated and about to emigrate in Brazil, there must also be a rational freedom of the expansion of popular culture, integrating or replacing (and never supplanting) the actions of the Brazilian States in this matter. The future work of our teachers in America should be based on culture and civilization, in defense of our feelings and not offending nor neglecting those of others; it should be of reasonable tribute to the country's conditions. The Italian school must be included as a mean of protection and of the attentive providence which the fatherland disposes, and not a means of determining currents of thought and hostile emotions towards the host country; instead, it should create more worthy guests. The formation of teaching personnel to Brazilian emigration, and there is a need of more than 2000 of such, while it is still necessary to our new generations within the country, will seem to some people an inopportune anticipation. But we can answer that illiteracy, even worse than the occlusion of the feelings and of the national soul, would be a far greater barrier outside the



borders than it would within the country: and that if the State forces considered themselves unable in their efforts of spiritual safeguarding millions of Italians, in the only possible way, because they are not living on our soil, the State should at least help in every way corporations, missions, and any association that could give confidence to the national attempts, especially by appointing Italian religious people to the Italian colonies, while accepting the protection and supervision of the State. (Report from DGSIE, s.d. [but from 1921])

The question of education was the object of a true diplomatic intervention in 1924, in the eve of the visit by the ambassador in Brazil, Badoglio, when the director of the organization in charge with the management of the Italian schools abroad drew up a memorandum in which the fundamental points to be developed at the diplomatic level for supporting the process of *italianità* were recalled. The diplomatic action had to be directed, in particular, to “temper the restrictive provisions on the freedom of teaching in foreign schools (which is especially true for the state of São Paulo in Brazil)”; to the recognition of the equality of the Italian language in the local school programs and to the action with individual institutions aiming to introduce the teaching of Italian in local schools, in particular in those managed by Italian religious orders, especially the Salesian ones. The efforts should also be directed to the assignment of Italian clergymen in the parishes of the Italian colonies with schools, in order to counterbalance the presence of clergymen of other nationalities—particularly the French. The plan also included the foundation of middle schools, the creation of co-ordination and inspection offices, the restoration of the consular agent position (by then fallen into disuse), a more effective training of teachers for Italian schools, the enactment of missions for the foundation of new schools to be entrusted to the Catholic Association Italica Gens, and a better distribution of subsidies and locally prepared school supplies, starting from textbooks (Pro-Memory, 1924). In essence, during this first phase of Fascism, by preparing a comprehensive program, the government leaders and the head personnel in the ministries focused on a greater involvement of local communities through the collaboration of local religious institutions, which would consolidate the educational institutions responsible for guaranteeing the expansion and the defense of the Italian national identity character.

During the first half of the twenties, however, the number of ethnic schools decreased along with a change in their characteristics. Both the consular agents on mission in Rio Grande do Sul and the other consular authorities noticed a significant reduction in the number of secular schools, matched by a growth in that of religious schools, in addition to the dissemination, in both rural and urban areas, of schools promoted by the Brazilian State after an intensification of nationalist intents (Bastos &

Tambara, 2014; Quadros, 2014). A consular agent of Italica Gens was the first to identify, during a long mission which lasted almost two years, the loss of attraction of Italian schools. In August of 1922, while describing the situation of the schools of Porto Alegre, captain Luigi Seghetti wrote that:

the conditions of the Italian schools here are not prosperous at all. I observed bitterly the greatest lack of interest regarding the study of our language. In general, we could say that their children [of the immigrant settlers] do not speak Italian and they do not study it. And even when they do study the language, as it has already been observed, they do not speak it. The parents care that their children know Portuguese and other languages considered necessary, and most are thus sent to Brazilian schools. An Italian mother, owner of a hotel, told me that her daughter goes to the German school, and that the kid will have enough time to learn Italian. I've heard about many people who hold important positions in the patriotic associations and whose children cannot speak a single word of Italian. There are three Italian schools here: "*Umberto I*" and "*Princess Elena of Montenegro*" (both of them maintained by the namesake charitable societies) with the elementary classes, and the *Instituto Italo Brasileiro Dante Alighieri* (a small school with some external students), which, besides the four basic courses, offers four commercial courses. The three schools are attended, in total, by no more than 130 students (our colony in Porto Alegre is composed by about 30,000 people). The Italian language is not taught in the government schools. Until 1918, for admission into the faculties of law and into the engineering school it was required to pass in the examination in one of these three languages; English, German, Italian. Since that year, the Italian language was excluded. (...) As an accelerating factor in the decline of the *italianità* in the colonies, and contrary to the government regulations, we could bring to mind the indifference of our fellow countrymen, who, while on the one hand solemnly celebrate the sixth centenary of Dante and on every occasion give clear evidence of their ardent love for Italy, on the other hand do not bother if you don't teach their children the language of their country of origin. (Report of Seghetti, 1923)

A few years later, the consul of Porto Alegre, Luigi Arduini (1925), spoke of a real "debacle", of a "disastrous situation". In particular, Arduini denounced "the current conditions, unfortunately far from thriving, in our schools", with a special emphasis to the state of "abandonment" and "carelessness" in which had fallen "all small secular schools" in the colonial area, subsidized by the royal government and most of them located in the rural zone, our "little bastions of *Italianità*." At the same time, he once more spoke of the poor "effectiveness, utility and scope" of the teaching actions performed by institutions sponsored by religious congregations, "most of them of French





origin and mentality”, for the promotion of the national language. The report of the consul, which would rise rather alarmed reactions within the ministerial meetings<sup>3</sup>, reported with the following words the loss of the national feeling within the Italian immigrant population and their condition of isolation that a few years earlier had represented a force of resistance to the “*Brazilianization*” process:

The process of denationalization is of course much easier in the cities than in the countryside, but the fact is that it is increasing, even in the countryside, with the construction of new highways and roads, with the intensification of trade relations between the colonies and the population centers and, mostly, with the work done by local authorities, who do not look favorably upon foreign schools, no matter how modest they are, and try to close them in every way they can. (Report of Consul Arduini, 1925, p. 5)

Arduini did not perceive opportunities for an “advance”, but on the contrary the need of outlining a true “barrier” through a series of measures including an increased financial commitment, the support of schools in the colonial area managed by secular teachers, the insertion of Italian church personnel and an expanded diffusion and circulation of school supplies and textbooks (Report of Consul Arduini, 1925).

“PENS, NOTEBOOKS AND TEXTBOOKS”.

#### PRACTICE AND KNOWLEDGE IN THE ETHNIC SCHOOLS

Since the first experiences of schooling in colonial contexts, the consular authorities did not fail to emphasize the importance of appropriate teaching tools such as textbooks. Consul Marefoschi stressed the need of making school supplies available and the demand for textbooks for the first elementary classes in his report on the importance of the subsidy, in order

to cope with costs of paper, books, awards etc., which are demanded to encourage such incipient institutions, which live in a very precarious state.

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<sup>3</sup> In relation to the negative situation of schools, the consul made reference to the fruits of the “absenteeism of the Royal Government” what resulted in some nuisance within the Directorate General. The demands of Tralbalza were not helpful to change the tones and make them more compatible with what was indeed analyzed and reported by the consular agent of Itálica Gens, Cesare Bompard, who had sent the ministry a report that contained a less pessimistic view. As in the note by Ciro Tralbalza of 3 December 1925 in ASMAE, Archivio Scuola 1923–1928, b. 637.

(...) I should also ask this Royal Ministry to deliver as soon as possible a new supply of primers and textbooks for schools of first and second grade. For those of third and fourth grade I still have a certain amount, considering the restricted number of students who can profit from it. It would be quite necessary to have a certain amount of pens and notebooks for the first calligraphy exercises, as these items here are sold at a high price. (Report of Consul Marefoschi, 1889)

The problem of a wider circulation and distribution of textbooks and school supplies was already pointed during the first decades of colonization. The Vice Consul of Pelotas, Errico Acton, indicated the shortage of “elementary books, alphabets, syllabaries, first readings etc.” in immigration territories and the necessity of notebooks, given that paper was a luxury item in the colonial areas. His report also reminded of the risks posed by the introduction and use of Brazilian books, “which leave out the national character of education” (Report of Acton E., 1890).

The difficulties in the distribution and circulation of the educational material, and in particular of the textbooks used in Italian schools abroad, were a constant concern during that period. Already in a note prepared in 1894 by the Consul Angelo Legrenzi one can read as follows:

I hasten in informing you that, after 5 months of travel, I have finally received the 3 boxes of school supplies, and, as they were packaged with the habitual disregard by the part of Italian producers and industrial men, many copies of the books arrived worn out. (Report of Consul Legrenzi, 1894)

Traces that reveal the use of textbooks in Italian schools in Brazil as well. However, the task of identifying which textbooks were in use in the schools established in the colonies is not a simple exercise. The consular sources available regarding the second half of the nineteenth century, allow a more precise identification of the few books used in the Italian schools established in the state of Rio Grande do Sul. Still, we can assume that the consular authorities required and received the kind of manuals that the ministry considered appropriate for Italian schools abroad, and for which the authorities had begun to offer more precise indications through the annual books published in the late eighties and mid-nineties, which inform us on the title of the books indicated for use. For elementary schools it was possible to use the primer and of the primer exercises of Giuseppe Toti. This teacher had created a booklet for the learning of writing and reading based on the most innovative methods of those decades, i.e., graded, phonic and illustrated, through which he intended to improve learning through the



simultaneous act of reading and writing: a method that had begun to be promoted in Italy since the mid-seventies of the nineteenth century (Barausse, 2014). Among those first texts circulated the reading book written by the Director of one of the largest and most widely read magazines for teachers, Gabriele Gabrielli, author of *I primi affetti*. But in addition to the book of Gabrielli, the Ministry suggested the same texts subject to an extensive use during the first two decades of the post-unification, such as those written by Pietro Dazzi. Among the titles written by this Tuscan author, a particular recommendation was given to *Il bambino* and *Il fanciullo*, intended, respectively, for the second and third grade. A second list of books was published in the annual for the year 1897. This second list was composed by almost all the texts already indicated seven years earlier, but complemented by new books that were in accordance with the programs reviewed by the Minister Baccelli in 1894. For the first grade of elementary school, next to the name of Gabriele Gabrielli, we find the primer and the related exercise book written by Siro Corti and Peter Cavazzuti, entitled *Il bambino italiano alla scuola* and published by in Milan by Vallardi, while for the second grades the books of Gabrielli and Dazzi were kept and still considered valid. For the third grade, *Il Frugolino*, by the administrator of schools in Rome Carlo Tegen, and *Lezioncine*, by Ida Baccini, were introduced as reading books. For the fourth grade, in addition to the *Grammaticetta* written by Fornaciari, the use of *Minuzzolo* by Collodi was also indicated. Collodi also appeared as the author of the indications for the fifth grade with *Il Giannettino*, accompanied by the novel *Cuore* by De Amicis. The poetic anthology written by Camillo Randazzo completed the picture of the readings. For the teaching of history and geography, besides the book of reading by Bacci and Gotti entitled *Le Glorie della Patria*, the text of Pietro Valle was also listed (MAE, 1897, pp. 63-66, 1899).

The circulation of the books that made the lists of the ministry is confirmed by other documentary traces, such as the circular distributed by the consul Pio di Savoia in which the reform in the system of distribution of subsidies was established. After clarifying the intention of eliminating the abuses and the confusion in the distribution of books, he wrote

I mentioned a regular allowance for books to make it clear that, unless for exceptional and entirely plausible reasons, once we have made the first shipment of books to the beginning of the school year, following the criteria that will later be shown, we shall not make others, given the confusions and abuses that have deplored the distribution of those books in past

And the Consul announced the adoption of some criteria, for, considering

the very elementary nature of the ethnic schools and in their distribution, we will take into account the number of students in each school.

In the book distribution, as I am directed by the Superior Ministry, we should not pass the limits of the indispensable, given that the student in these schools does not need many books, but the books proposed need to be well suited to his intelligence and to the level of education that we want to achieve. (Circular Pio di Savoia, 1894)

For these reasons, the consul referred to a rather limited book production, choosing among the titles reported in the annual books: among the books intended for distribution he indicated the two parts of the text written by Caramuele De Luca, entitled *Leggere, scrivere e pensare*, that seemed to match both the educational needs and the objectives and requirements of the local schools. At the same time, the consul did not state the need for an arithmetic text which, “however elementary, surpasses the needs of these schools and the learning of the four operations—to that extent we cannot advance—the best book is still the blackboard”. The head of the consulate pointed to the need to replace the book of Giovanni Merighi, *Morale nella Storia*, then distributed to schools, with *Geografia teorico-pratica* written by Eugenio Comba. He also indicated the *Grammatichetta italiana* by Raffaele Fornaciari. All these books were considered “elementary books, but not sufficient to these schools, and the teachers will keep a very limited number of copies in order to distribute them among the most advanced and promising students” (Circular Pio di Savoia, 1894).

Regarding religious instruction, the consul indicated that the ecclesiastical authorities would be responsible for the provision of the catechism to the children of Catholic faith. But there was a significant note:

it is highly desirable that children of Italian immigrants also receive religious education, and in fact particularly the religious education, in Italian, and the prayers intended to be their most intimate comfort in the struggles of life until their deathbeds should be registered in their minds and in their hearts in the sweet mother language; therefore, I am willing to perform the necessary actions at the Italian Government, or privately through the Italian Society of Patronage for Emigration, in order to obtain the appropriate texts. I will wait, though, that the teachers inform me the needs of their schools and the number of catechisms that I should ask. (Circular Pio di Savoia, 1894)



The content of the three boxes to which consul Legrenzi referred in the aforementioned document confirms the circulation of the texts indicated in the official information of the lists approved by the Ministry: 1500 copies of the first volume of the primer written by Caramuele De Luca and another 1500 of the second volume; the geography book written by Eugenio Comba, the history book written by Giovanni Merighi, and the grammar book by Raffaele Fornaciari. One ABC poster and four maps were also part of the material. The boxes should also have contained 1000 copies of the first readings by Gabriele Gabrielli, which were missing due to the customary malpractices in distribution remarked by the consul. However, it is worth to examine briefly the words that followed the reception, a signal of the real difficulties faced by the settlers:

I will now begin the distribution of the books we received among the 1936 students of the 55 Italian schools in this State, as indicated in the statistical sheet attached and compiled for the occasion, delivering to each teacher, based on the number of his students, 75% of each of the two parts of the primer, 15% of each of the other works and, to those most in need, some ABC poster or a map, collecting from each delivery the corresponding receipt, which will be sent to Your Excellence in order to legitimize the work of this Consulate. And, given the existence of a huge demand, by the fact that all of our schools in this State receive the children of poor farmers and workers, I would ask Your Excellence to order and send me, while requesting diligence in shipment and a better packaging, the 1.000 copies of Gabrielli that were promised, and possibly some more ABC posters, not a complete series, but the first sheets at least, plus two or three thousands of small striped notebooks for the first writing classes, because, in consequence, of the high prices of paper here, the children do not write, while I am aware that in Italy those notebooks cost 10 cents each one, and also blotting paper. (Note of Consul Legrenzi, 1894)

The limited choice was an answer to the standards of a publishing production destined to ensure the transmission of educational models and values which were dear to the liberal class, the bourgeoisie.

During the first decade of the twentieth century, the circulation and distribution of textbooks in the colonies continued to be considered a central point, while sometimes disregarded, for the functioning of the ethnic schools. The consular officials reminded on several occasions that “little schools”, that reached a quantitatively significant presence, “survive especially because of the reading books dispatched by the Italian government” and for this reason it became necessary to provide for their distribution at the beginning of the school year (Report of Consular Agent

Ancarani, 1909); the immigrant teachers' activities would be more effective if they could receive school supplies and “in particular primers, reading books, and small arithmetic compendia” (Report of Consular Agent Petrocchi, 1909). The officials did not refrain from indicating specific texts, such as those of Fornari for the teaching of history and geography (Report of Consular Agent Della Ragione, 1909) or the history book written by Carlo Pozzi and published by Paravia (Report of Consular Agent Ancarani, 1909). Meanwhile, the consuls could potentially count on a richer production. After the decisions of the Minister of Education, Orlando, to put an end to the experience of centralized committees for the evaluation and review of textbooks for the entire previous decade (Barausse, 2008), the Foreign Ministry, through the General Inspectorate, arose the question of how “to perform a total reconstruction” in the list of textbooks (Memorandum, 1905). The documentary material, however, does not confirm the production of a new list in the following years. The definition of guidelines on textbooks became more complex with time, but only at the end of World War I a much more significant revival of the question of textbooks in Italian schools abroad can be identified.

In fact, the Italian ethnic schools located in the Brazilian State in the early twenties could rely on a production of Italian texts that was richer than in the past. This was also the result of a strong commitment from the ministerial authorities in defining a specific list for Italian schools abroad. Since January 15th, 1921, a Special Commission of the Ministry of Foreign Affairs was in charge with the approval of some manuals (ASMAE, 1921; Contini, 1932, p. 148), but a Special Commission for the examination of manuals within the Ministry of Colonies was reestablished by a Decree of April 10th, 1921. On February 26th, 1922, when this commission still had not completed its work, the Directorate General informed the list of approved and unapproved books for elementary schools. The Director-General invited the consular offices to transmit the note “in confidence” to school managers, to not communicate the lists, and to make use of them only if teachers insisted in adopting textbooks that were not approved by the commission. The list included twenty-five titles of primers, first readings and other reading books; four grammar and writing titles; a manual of moral education; six books of history and geography; nine arithmetic and geometry manuals. We ignore the reasons for this choice. However, the work of the commission did not have a significant continuity, largely due to some changes in its composition (Barausse, 2015b).

During that period, to request the production of more suitable books for Italian schools abroad, the ministerial authorities, as well as the committees, resorted to specific measures such as public announcements by the Ministry of Education for the production of new textbooks that would be adopted in Italian schools abroad and in ethnic territories. The first procedure was a



public announcement for the production of a book of national history to be adopted in primary schools and free courses abroad<sup>4</sup>, followed by a second announcement for a reading book intended for Italian schools abroad<sup>5</sup>; later, a public announcement to produce manuals for elementary schools in Tripolitania and Cyrenaica was issued<sup>6</sup>.

The first announcement expected the production of a book which would deal with the provisions of government programs for the teaching of history in primary schools and, at the same time, encouraged nationalistic feelings since childhood.

A patriotic text that could

give an adequate idea of what the world owes to Italy: not a depository of erudition, but a thorough knowledge; not an assortment of names and dates, but safe chronological guidelines; not an accumulation of concepts, but a whole understanding of the multiple and complex elements of historical life; not an emphasis, but a contained passion and faith, capable of stimulating in the tenderest minds of readers the pride of being and feeling Italian. (Barausse, 2008, p. 1331)

The second public announcement, of December 1921, instituted a prize to promote the writing of a reading book to be used in primary education abroad. The resulting work, to be completed in five volumes, should correspond to the programs established for the schools of the Kingdom, but should also adapt itself to the particular local conditions in order to encourage the local students attending Italian schools. Its texts should not only give account of the differences in habits and behaviors between males and females, but they should also consider the different environments, “especially in the case of the Mediterranean region and the Americas”, highlighting above all

the contribution made by our great and humble workers for the development and expansion of civilization in the world, in every subject and every place, so that the feeling of nationalism in the Italian children living in so varied and distant countries would be enhanced and made stronger by a conscious faith in the greatness of the nation. (Barausse, 2008, p. 1335)

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4 Bando di concorso a premio per un testo di storia patria ad uso delle scuole elementari e popolari italiane all'estero, *Bollettino Ufficiale del Ministero della Pubblica Istruzione* [henceforward BUMPI], n. 25 Vol. II, – June 22nd, 1922, pp. 968–969.

5 Bando di concorso a premio per un libro di lettura ad uso delle scuole elementari italiane all'estero, BUMPI, January 12th, 1922, II, pp. 44–45.

6 Ministerial Decree of August, 20th, 1922 – Concorsi per libri di testo nelle scuole primarie della Tripolitania e della Cirenaica (published in the *Gazzetta Ufficiale* of October 31st, 1922, n. 256), BUMPI, n. 45, Vol. II, – November 9th, 1922, pp. 2081–2085, now also in A. Barausse, 2008, vol.II, p. 1331.

In terms of reading books for the six grades of primary schools in Tripolitania and Cyrenaica, however, this second public announcement had criteria indicated by the Ministry which reflected a more moderate nationalism through a pedagogical approach that intended to consider traditions and local cultures. The authors, for example, were asked to avoid “any trait of confessional nature and also to avoid moral judgments or examples that [could] offend the feelings and practices of Jews and Muslims”, as well as to avoid “patriotic demonstrations that [would] be ineffective among non-Italian students”; they were also asked to include in their narratives not only Italian children “but also, occasionally, local children”, fostering in the students a “mutual affection and respect, despite the deep differences of nationality, race, confession, and habits” (Barausse, 2008, pp. 1335-1336).

These actions anticipated the changes in the cultural and educational environments that in the following year led to a new proposal of ministerial initiatives, with the establishment of the committees for reviewing textbooks. The first one, chaired by Lombardo Radice, would begin a brief but intense season that, through the work of subsequent committees chaired by Vidari, Giuliano, Romano, and Melchiori, all similar in their intention of detailing the fascist textbook, would represent a significant change in the scenario of Italian educational publishing (Ascenzi & Sani, 2009; Galfré, 2005).

The arrangement of the editorial products for Italian schools abroad was also affected by the intervention of the new programs launched by the regulations of October 1st, 1924, designed for an educational program in which schools would be of key importance, as indicated in the words of the instructions for teachers. The new programs established by an Order of October 1st, 1924, would also influence the type of editorial products for Italian schools abroad. They were designed for the specific function of the Italian school abroad, destined to assume a fundamental importance in contexts marked by very specific problems, such as language, religion, and culture, and intended to adjust the nationalistic tones to a more moderate way (Oriani, 1926, p. 86). The reading books played a fundamental role and the programs gave very precise instructions on them:

The choice of textbook for schools abroad was a delicate task. The textbook should have ample references to the life of our distant colonies, it should exalt the feelings and the love for the homeland without offending other nationalities, it should teach the beauty, the old and the new monuments, the most magnificent forms of civilization and of activity, presenting the most representative people and recalling the unmeasured efforts made during the recent national war. (Oriani, 1926, p. 93)





The fruit of this first season was the production of books that were oriented to encourage the transmission of educational models based on the pride of the Italian cultural traditions and, at the same time, to foster the ability to be good Brazilian citizens. Their usage and distribution were considered essential and fundamental by the consular authorities for the recovery and preservation of the ethnic identity, at a time when the prevailing inclination in Brazil seemed to be that of “denationalization”. Among these were books such as the one of Francesco Pasciuti and Giovanni Di Giusto, entitled *Cuore lontano*, published by Mondadori in 1922 (Pasciuti & Di Giusto, 1922); or the one of Alarico Buonaiuti, published by Bemporad in 1925, entitled *Italia lontana* (Buonaiuti, 1925). Buonaiuti's volumes were distributed from the beginning of the second half of the twenties: it took almost three years for the work of the first public announcements to be finished. Only on December 2nd 1925, six months after the delivery of the report by the committee, Mussolini officially announced the results, which were negative for the two announcements for the history book and positive for the two of the five volumes of reading books by Alarico Buonaiuti (Report of Boselli, s.d. [but of 1924]).

The Italian consular authorities of Rio Grande do Sul judged the textbooks an essential tools to prevent the loss of national identity traits. Consul Luigi Arduini reaffirmed this view while stating the need for an organized distribution of textbooks by the consulate, particularly in the case of “bilingual primers, primer exercise books, reading books for primary classes (rural schools in Italy), notions of history and geography, arithmetic manuals, descriptive geographical posters”, along with “small blackboards, chalk, notebooks and writing materials”. The consul also demanded that they were not issued from the stock funds that some publishing houses “had no qualms about sending to Rio Grande do Sul ignoring completely the environment to which they were intended” (Report of Consul Arduini, 1925, pp. 14-15). This framework was also confirmed by Cesare Bompard, an agent member of the Association Italica Gens on a mission in the colonial area, who reminded the heads of the Directorate General of Italian Schools Abroad inside the ministry not only of the essential function of the textbooks, but especially of the lack of responses to the demands expressed by another agent from Italica Gens, the aforementioned captain Seghetti. In his demands, the agent had pointed how the shipping of religious books “tuned to a live religious sentiment” was “absolutely essential”, reminding the opinion “of most of the teachers” about the book of Alarico Buonaiuti, *Italia Lontana*: “They have summarized their judgement in this statement, 'here is the book for our schools’”. But, as if to emphasize the deficiency of the consular authorities, the agent remarked that there were 150 copies deposited in Porto Alegre “that so far have not been delivered because the Consulate claims to have no instructions to this concern” (Report of Bompard, 1926, p. 6).

The question would however suffer further changes soon, in the face of decisions and guidelines that were developed by the heads of Italian fascism after the country's totalitarian turn. This led to the reorganization of both the management of schools and Italian communities abroad proposed by the Foreign Ministry and the guidelines for the textbooks, with the intention to better adapt these books to the new functions of educational institutions, which were a special vehicle for the fascist propaganda and for the building of the “new man” also in Rio Grande do Sul, precisely when the Brazilian political class was starting to encourage the internal process of nationalization, the *Brazilianization* (Barausse, 2015b).

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**CAN WE TALK OF EDUCATIVE MODERNITY WITHOUT METAPHORS?  
THE EXAMPLE OF THE AGRICULTURAL METAPHOR IN THE  
PEDAGOGICAL WORK OF CÉLESTIN FREINET**

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**ABSTRACT**

In this study we shall try to understand the way educative modernity, through the pedagogical work of Célestin Freinet (1896–1966), can be expressed by the use of metaphors. In this case, the agricultural metaphor. In this context, the author, influenced mainly by the work of Paul Ricoeur, Daniel Hameline and Naninne Charbonnel on metaphor, will attempt to understand whether or not the agricultural metaphor is opened to symbol and to question the nature of the symbol itself, which starts in the metaphor and goes up to a semantical level which is more speculative in nature than properly educational. In this context, the pedagogical work of Freinet will be analysed in order to illustrate in a better way not only the massive use of the agricultural metaphor but also to question the educational and hermeneutical meaning of that use itself. This questioning will be in itself part of the answer to the initial question and it also opens the way to other and new interrogations even if they generate themselves a “conflict of interpretations” (Paul Ricoeur, 1969).

**KEY WORDS**

Educative modernity; Metaphor; Horticultural metaphor; Célestin Freinet.



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# Can we Talk of Educative Modernity without Metaphors? The Example of the Agricultural Metaphor in the Pedagogical Work of Célestin Freinet

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It is not at all indifferent that the student might be compared to a vessel one might fill up, or to a plant that grows. (...) everything that has been said about education locates us at the uncertain borders of Rhetoric, a place ruled by metaphor, in the ambiguity of its repetitive compulsions and its creative snappishness

Daniel Hameline, 1981, pp. 121 and 131

## INTRODUCTION<sup>1</sup>

The educators and pedagogues of educative modernity, in particular those belonging to the New Education movement, like Célestin Freinet (1896-1966) (Acker, 2007; Audet, 2010, pp. 253-269; Barré, 1995-1996; Clanche, Debarbieux & Testanière, 1994; Legrand, 1993, pp. 403-418; Maury, 1988; Nunes, 2002; Pain, n.d.; Peyronie, 1994, 1999; Sivell, 1994), see the spiritual development and the psychological maturity of the child as a plant that has its natural cycle of development and see the educator as a gardener<sup>2</sup>, who patiently needs to take care of it during its integral development (Freinet, 1994, T.2, pp. 107-108; Nóvoa, 2005, p. 79)<sup>3</sup>. Because of this, for all these authors it is not at all indifferent “That the pupil is compared to a receptacle which is filled or to a growing plant” (Hameline, 1981, p. 121). In fact, it is not totally indifferent considering that both pedagogical metaphors lead to quite different conceptions either of the pupil or the teacher: the first, and reminding here Montaigne and

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2 Cf. “Le bon jardinier, ou le cycle de l’éducation” (Freinet, 1994, T. 2, pp. 107–108).

3 António Nóvoa calls the attention to the fact that the concept of integral education “is probably the one which defines more accurately the educative modernity, and which implies the necessity of articulating the physical, intellectual and moral education. Later on, the necessity of an integral social conscience is also required” (2005, p. 79).



Paulo Freire, points to the idea of “full heads”<sup>4</sup> and of “banking education”<sup>5</sup> (Traditional School in its general sense); the second, and having the two previous authors in mind, points already to “well-made heads” and the “problematizing education” (New School). It is this last conception that the New Education prefers by having recourse to a set of metaphors, in particular the agricultural metaphor, in order to better legitimate its educational “sayings”, and also in order to give them the respectability they long for. And when we write respectability we mean pedagogical eloquence too and also the persuasion of the rhetoric of the pedagogical-educational “sayings” where the idea of “similitude” is never too far away (Charbonnel, 1983, p. 157; 1994, p. 52; Hameline, 1986, pp. 125-127).

In this context, facing the question whether educative modernity can be spelled out without metaphors, having in mind the pedagogical work of Célestin Freinet, we shall divide the present study into two parts: in the first, we shall deal with the importance of the agricultural metaphor in educative modernity; in the second, we shall deal with the agricultural metaphor in the work of Célestin Freinet. In the conclusion we shall say that it is hardly possible that one of the greatest fundamental currents of pedagogy of western educational modernity—the New Education movement (Hameline, 2000, pp. 15-95), can dispense of the place and function of the metaphor when its actors, and in particular Célestin Freinet, write and speak about education.

## THE FASCINATION OF EDUCATIVE MODERNITY FOR THE CHARM OF THE AGRICULTURAL METAPHOR

Educative modernity cannot escape the power and charm of the metaphor, in special by what Daniel Hameline has called “the great horticultural ‘dreamery’” (*songerie*, in the original) (1986, pp. 182-185). The horticultural metaphor has the heuristic gift of taking us through a semantic detour (Hameline, 1981, p. 122), starting with the figurative sense and going then to the questioning of the meaning of the human formation (*Bildung*) (Gennari, 2006, pp. 4413-4418), to that which Hameline has designated the “fundamental”, “structuring” and “originary belief”:

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4 We refer here to the work of Michel de Montaigne who, in his *The Education of Children* (2005), Chap. XXVI—*Of the Institution of Children*, stresses the following: “people should be careful to choose him a preceptor who rather have a well made head than a well filled head and it should be required of him both things, plus the customs and the understanding rather than science; and that he should behave in a new way” (2005, p. 44).

5 See chapter 2. The conception of “banking” education as a tool of oppression. Main arguments and critics, pp. 57-61 of the book by Paulo Freire titled *Pedagogia do Oprimido (Pedagogy of Oppressed)* (1968-1970). See chapter 2 - La Tête Bien Faire, p. 23-36 by Edgar Morin in his book *La Tête Bien Faire* (1999).





if anything is transportable from one word to another, if the pupil is, in a sense, a growing plant, it is so because there is between the pupil and the plant an *analogy* that does not belong to the order of ornamentation of the discourse but belongs to the order of being. (Hameline, 1981, p. 123)

In comparing the child to the growing vegetable, that meant to consecrate the idea of “the creative spontaneity of the child” (precisely the theme of the Congress of Calais, in 1921) as one of the dearest ideas of the progressives of the New Education.

#### A FEW WORDS ON EDUCATIVE MODERNITY

It is the pedagogical agenda of the “International League for the New Education” that sets the tone for the educative modernity that the French pedagogue subscribes: the International League’s title is not only suggestive but also prophetic: *Pour l’ère nouvelle*, a new era of peace where the terror and the horror of the World War I shall never be repeated and with “new men” formed by the new ideals of the New Education. Its supporters speak of a rupture with the pedagogical past, especially the ideas of the Traditional School and what only matters is to prolong “a current of ideas whose presence is already perceptible along the nineteenth century” (Hameline, 2000, p. 19). It is, then, the nineteenth century, the educative century as it is called by Hameline, that marks the educative modernity, which started in the eighteenth century with the philosophy of the Enlightenment and spans until contemporaneity (Hameline, 2000, p. 22) and is constituted by three “common places”: that of “progress”, that of “educability” and that of “egalitarian democracy” (Hameline, 2000, pp. 24-36).

All of these “common places” (Hameline, 2000, pp. 232-24) are conspicuous in the pedagogical work of Célestin Freinet: they can be found in his pedagogical conceptions and practices and in his political options. Symptomatically, these same “common places” hardly escaped the charm of the metaphor: as an example the use of the metaphor of light to celebrate the “common place” of *progress: Post tenebras lux* (Hameline, 2000, p. 25). Thus, there is no wonder that the pedagogical work of Célestin Freinet has not escaped that same charm: we should remember that the idea of the *educability*<sup>6</sup> of the pupil was placed under the sign of the agricultural metaphor in opposition to the metaphors of modelling, of the receptacle, and of filling up.

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6 The humanist educability creed must be understood having in mind Pindar’s famous adage: “Become who you are”.

Remembering the second part of our epigraph, which says that “all we say about education situates us, for a long time, on the uncertain edges of Rhetoric, where metaphor reigns supreme, in the ambiguity of its repetitive compulsions and its creative impertinences” (Hameline, 1986, p. 131), our approach is fundamentally hermeneutic. The reason for that is that we are not content only with the instauration of a new semantic pertinence (semantic domain), but we attempt to penetrate in the domains of thought and the symbolic with all the hermeneutical effort it requires, as Jean-Jacques Wunenburger has studied (2002, pp. 27-42, pp. 91-103)<sup>7</sup>. In this context, we accept Paul Ricoeur’s position on metaphor (1976, pp. 45-69, 1994)<sup>8</sup>, although we are aware that not all educational metaphors are equivalent and much less can they present themselves as “alive”, in the sense that Ricoeur uses (1976, p. 52, 1994; Hameline, 1986, pp. 79-82, pp. 83-93). Thus, in short, the metaphor for this author appears in the intertwining of the literal meaning (denotation) with the figurative meaning (connotation); it has to do with the semantics of the sentence; it is a phenomenon of predication and not of denomination; the metaphor is the result of the tension between two terms in a metaphoric enunciation; and a metaphor of tension is not translatable because it creates innovative meaning; it offers new information because it tells us something new about reality; finally, a metaphor does not exist in itself but in and through an interpretation (Ricoeur, 1976, pp. 46-53):

What is at stake in a metaphorical utterance, in other words, is the appearance of kinship where ordinary vision does not perceive any relationship. (...) In this sense, a metaphor is an instantaneous creation, a semantic innovation which has not status in already established language and which only exists because of the attribution of an usual or an unexpected predicate. (Ricoeur, 1976, pp. 51-52)

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7 Here we must acknowledge Paul Ricoeur’s teachings in his *The Rule of Metaphor*: “The passage to the hermeneutic point of view corresponds to the change of level that moves from the sentence to discourse properly speaking (poem, narrative, essay, etc.). A new problematic emerges in connection with this point of view: the issue is no longer the form of metaphor [in case of the rhetoric] as a word-focused figure of speech, nor even just the sense of metaphor [in case of the semantic] as a founding of a new semantic pertinence, but the reference of the metaphorical statement as the power to ‘re-describe’ reality. The most fundamental support of this transition from semantics to hermeneutics is to be found in the connection in all discourse between sense, which is its internal organization, and reference, which is its power to refer to a reality outside of language. Accordingly, metaphor presents itself as a strategy of discourse that, while preserving and developing the creative power of language, preserves and develops the heuristic power wielded by fiction” (2004, p. 5).

8 Concerning the “state of the art” on the metaphor analysis, see the book by Jaakko Hintikka, *Aspects of Metaphor* (1994) Raymond Gibbs, Jr, titled *The Cambridge handbook of metaphor and thought* (2008) containing a discussion of the aim and the character of the metaphor in several domains, namely in education. Following the same argument, see *Metaphor and Thought* edited by Andrew Ortony (1979) and according to the philosophical perspective of the metaphor a book by Mark Johnson titled *Philosophical Perspectives on Metaphor* (1981). However, the work of Max Black is also considered in our study on the metaphor, namely the book *Models and metaphors*. Studies in language and philosophy, such as the classical work by Georg Lakoff and Mark Johnson, *Les Métaphores dans la vie quotidienne* (1986) (Metaphors We Live by – 1980).



Thus we can say, with Daniel Hameline, that one of the main functions of metaphor is “to make thought appear” (1981, pp. 130-131, p. 138), that is, it should attribute a (con)figuration to thought which is told in language. And as all the educative “sayings” are said in and through language and always intend to think about the educative “thing”, then metaphors are a constant presence in educational thought (Charbonnel, 1991a, 1991b, 1993; Hameline, 1986; Scheffler, 2003, pp. 73-88).

But whose metaphor are we talking about in education? It is the metaphor *in absentia*<sup>9</sup> that one which, by resorting to “similitude”, is better prepared to express the “sayings” in education, that one that is better prepared to make eloquence pedagogical, or the eloquence of the “sayings” on education a success either on the level of “the declarative exposition of ideas of conventional evidence” or on the level of “the sermonizing incitation about feelings that are not less” (Hameline, 1986, p. 139). Finally, although Daniel Hameline stresses that the analogical “it is like...” constitutes a “poor’s hermeneutics” (1986, p. 127) and that “the triumph of similitude” is modest (1986: 135-139), the author, in detriment of the symbol and of its own hermeneutics (1986, p. 129-135), ends by opting for the metaphor, that is, by the “triumph of similitude”. This is because of his admiration for rhetoric and argumentation (Hameline, 1986, pp. 166-172; Perelman, 1988, 1989; Perelman & Olbrechts-Tyteca, 1992; Reboul, 1994). The “similitude” offers to the pedagogical and even to the educational discourse, respectability, reasonability and the legitimacy that it lacks. Why? Because as the “sayings” in education belong predominantly to the domain of the plausible<sup>10</sup> and less to the domain of the true and the scientifically experimental, thus it needs the metaphor, that gambles on similitude (Hameline, 1986, pp. 126-127), in order to see, to convince, to act and to touch<sup>11</sup>:

In reality, in what it is said about education, the effect of metaphor is at service of the project of sharing a conviction, of inciting to action, to legitimize one practice or to disqualify another. It is itself part of pedagogy. The ‘as if...’ is used to improve understanding of the often heavy and convenient illustration. Convenient in the acquired form: the comparison instruments are very visible; convenient for the perspicacious pertinence of *imagerie* [as in the original] according to expectations. (Hameline, 1986, p. 136).

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9 Here we are talking about metaphor in its strict sense (Hameline, 1986, p. 125).

10 The metaphor seeks to produce, in the economy of the discursive argumentation, persuasive effects, if not even, in the limit, to shake or to contribute to the fathoming of the convictions of the interlocutor or the reader (Hameline & Charbonnel, 1982, p. 5).

11 Daniel Hameline calls the attention to the fact that it is not surprising that in the metaphoric of education: “it’s the doceat [show or teach] that prevails” (1986, p. 138).

The authors of the New Education movement use the metaphor, namely the agricultural metaphor, in order to say more than they would say when they talk about development and growth of the child because “The cultivation of the soil, a matrix in many of our thoughts on culture, is one of the great reservations on which they are based to understand human things” (Hameline, 1986, p. 184).

#### UNDER THE CHARM OF THE AGRICULTURAL METAPHOR

The great majority of the authors of the New Education movement use the “horticultural metaphors” in order to best “celebrate the miracle of infancy” (Hameline, 2000, p. 49). The New Education ideals and its authors promote an authentic cult and ritual of the plant (Hameline, 1986, pp. 182-185). And it manifests itself in the agricultural comparison, or in the vegetable, with a set of naturalistic images which belongs to the same comparison and is also used to consecrate in a better way the excellency of infancy:

A metaphor is thus proposed to celebrate the childhood miracle, as long as it unfolds naturally. It is charged with “revealing” the little being which develops on its own according to a plan the child brings along with him and could not be dictated from the outside, like the plant around which the good gardener pedagogue’s main role is to prepare and care for the soil. (Hameline, 2000, p. 49)

From all this, it is understandable that the agricultural metaphor has strongly attracted several authors of the New Education movement, like Édouard Claparède (1873-1940)<sup>12</sup>, Adolphe Ferrière (1879-1960), Pierre Bovet (1878-1965), and Célestin Freinet among others, who convincingly used the vocabulary of horticulture in order to talk about infant growth and development (the culture of the child) in opposition to the metaphors of moulding, of furnishing, of feeding and of the receptacle used by Traditional Education (Snyders, 1975, pp. 13-54), even though this opposition may be attenuated (Hameline, 1986, pp. 145-155)<sup>13</sup>: “The horticultural metaphor is a constant presence in the pedagogical currents that opposed the common place of the

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12 On this matter, we can read in *Psychologie de l'Enfant et Pédagogie Expérimentale. I. Le développement mental* the following passage: “That pedagogy should rest on the knowledge of the child as the horticulture rests on the knowledge of plants is an elementary truth. However, it is entirely unknown to the majority of pedagogues and of almost all school authorities” (Claparède, 1946, p. 71).

13 We write “attenuated” because Daniel Hameline reminds us that the “furnishing” metaphor does not seem to shock Edouard Claparède himself (Hameline, 1986, p. 155).



living being to make (or let) grow, to the common place of the product to mould (mechanical but more often social)” (Hameline, 1986, p. 182).

The New Education pedagogues loved to talk about the gardener and compared him to the teacher and the educator: “The gardener’s metaphor is a paradigm that is used as an instrument to see and understand, in a first approach, the possibilities it affords to say immediately what is essential” (Hameline, 1986, p. 180). In this context, the agricultural metaphor was utterly in line with the New Education conception of the child and the way the child should be educated. This analogy between pedagogy—as a scientific knowledge of the child—, and horticulture—as a (scientific) knowledge of plants—, was clearly accepted by the “apostles” of the New Education as an (almost) elementary truth and became a “common-place” of the new educational ideas (cf. Daniel Hameline, 1986, pp. 61-72): “The plant and the child are both living beings and both the result of culture: in the same way as there is a horticulture so we can speak of ‘puericulture’” (1986, p. 181). A comparison which may be or not sophisticated, under the form of similitude, (1986, pp. 124-127), and which is quickly expressed by a “ought to be” or even by a “should be”. In this way, we go from rhetoric to ethics, as we also go from rhetoric to the pedagogy and the philosophy of education, when we admit that plants and children are a serious object of study because it is scientific, even when we know that: “The horticultural metaphor of education can only express the romanticism of non-intervention by the abstraction, in *imagerie* [italics in the original], of the reality of scientific horticulture, briefly industrial” (Hameline, 2000, p. 49).

In this context, we can hardly approach the pedagogical and educational texts of the New Education movement without facing metaphors: the horticultural metaphors (the ideas of growth and vegetal culture); the metaphors of light, the nautical metaphors, the travel metaphors (with the ideas of route and dislocation); the metaphors of moulding, of feeding and filling up, among others<sup>14</sup>. This set of metaphors has always been used, even though with different degrees, more or less voluntarily and in the limit involuntarily<sup>15</sup> by the New Education pedagogues, psychologists and educators, to better illustrate or see, almost sensibly, almost optically, the education and the pedagogical relationship between the child and the educator. In particular, the agricultural metaphor, frequently used in these new pedagogical texts, expresses synthetically the symbolic and symbiotic relationship between the education of the child and the vegetable’s growth or culture. This type of

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14 Nanine Charbonnel draws attention to the following range of metaphors in the educational discourse: “Sculpture and pottery, feeding and filling, gardening, farming, domestication, various crafts, marching and navigation” (1983, p. 157). On the metaphors of “filling”, “feeding” and modeling, see Nanine Charbonnel, 1991b, pp. 179-251 and 1993, pp. 5-54. In this regard, one should read Israel Scheffler, 2003, pp. 73-88.

15 In this regard, see the words by Daniel Hameline: “but the character of the metaphor itself is the fact that the ones who use it wish it to be non-metaphoric. This is a fundamental truth that comparison has spread” (1986, p. 182). Which therefore means that many authors never even admitted that in their writings the metaphorical naturalist game could play a role other than a mere stylistic or rhetorical effect.

metaphor intends to compare, even though it can vary in form and substance, the cultural and educational cycle of the child with the naturalistic cycle of the plant: the throwing of the seeds, in a prepared and cared for soil, and its gradual growth until it becomes, like the child, sometime later, a flower or even a tree in its plenitude. This way, we can perceive why pedagogy uses the agricultural metaphor as a kind of elementary truth, something that *va de soi*, that is, that naturally imposes itself on those who write and talk about the educative thing: “We know that the horticultural metaphor has returned, almost as an obsession, in the early twentieth century, among those who preconize the new education” (Hameline, 2000, p. 49).

In this way, Édouard Claparède, in his work *Psychologie de l'enfant et pédagogie expérimentale* (1946 [1905]), could but write that “it is an elementary truth” that “pedagogy should rest on the knowledge of the child as horticulture rests on the knowledge of plants” (1946, p. 71). These words summarize the postulate of the “primacy of the biological” that characterizes the “Copernican revolution” that the New Education represented for the western educational tradition and by using the Latin adage *Discat a puero magister*<sup>16</sup>—the master should learn from his pupil—as one of its main *leitmotiv*. The authors of the New Education movement use the agricultural metaphor as an “emblem of spontaneity” in order to stress the fact that the natural growth of the child should be respected such as the gardener respects the natural growth of the plants he cares for (Hameline, 1986, p. 183).

The texts on education can hardly avoid speaking of metaphors and of symbols because nothing can be more dramatic in education, according to Olivier Reboul, than to see “an education without symbols facing symbols without education” (1992, pp. 217–219). It is exactly to oppose the possibility of an education without symbols and metaphors or, in the limit, an education with dead symbols and metaphors that we chose the agricultural metaphor in order to illustrate that educative modernity, especially the New Education movement as exemplified in the pedagogical work of Célestin Freinet, cannot be either thought or written without the semantic resort (Charbonnel, 1991b, pp. 111–115) and even the hermeneutic resort (Ricoeur, 2004, 1976, pp. 46–53) of the agricultural metaphor.

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16 This is the Latin adage that is used as an emblem at the Jean-Jacques Rousseau Institute founded by Édouard Claparède, in Genève, 1912 (Claparède, 1946, pp. 50–51). Daniel Hameline, when referring to one of the key characteristics of the New Education Movement, writes that “the role of psychology is to bring about the ‘copernican revolution’ that will make the school programmes gravitating around the child, and not the child turning as best it can around a programme decreed without reference to him in the circumvolutions of the programmes. The only postulate of this revolution is the primacy of the biological” [italic of author] (1986, p. 182). On the New Education Movement we can consult, among many others, the following authors: Bloch, 1973; Hameline, Helmchen & Oelkers, 1995; Médiçi, 1995, pp. 9–40; Nóvoa, 1995, pp. 25–41, 1997, pp. 71–96; Snyders, 1975, pp. 55–130 & Vasconcelos, 1915.



## THE IMPORTANCE OF THE AGRICULTURAL METAPHOR IN THE PEDAGOGICAL WORK OF CÉLESTIN FREINET

Célestin Freinet uses abundantly the horticultural metaphor in his pedagogical work in order to illustrate more accurately his pedagogical and scientific-prone ideas about education. In his pedagogical work we specifically single out *The Wisdom of Matthew* (1949) and his *Essay on Sensitive Psychology* (1950–*Essai de psychologie sensible*). In this way, it is not surprising that the agricultural and naturalistic images used by Célestin Freinet serve, in the name of “the triumph of similitude” (Hameline, 1986, pp. 135-139), to illustrate and consecrate the philosophical-educational substratum of his thought contaminated by naturalism and by the principles of natural hygiene, besides the belief in the virtues of nature, very often equivocal (human nature or nature in itself), a nature that regenerates and welcomes man himself (Piaton, 1974, p. 202). Finally, it must be emphasized that the agricultural metaphor is a founding metaphor which specially determines our author’s work and which consists precisely of the comparison of the child as vegetal growth (Charbonnel, 1994, pp. 51-59).

The child, like the plant, is nature at liberty which the agricultural metaphor seeks to translate in its utmost expressivity. This kind of metaphor is intended, in the hands of Célestin Freinet, to help to understand better the evolution and formation of the child, and also to show that the child was in possession of “the same nature as the adult”. The child then emerges as “a tree that has not yet finished its growth, but that feeds, grows and defends itself exactly as an adult tree” (Freinet, 1994, T.2, p. 387).

## THE MEANING OF THE AGRICULTURAL METAPHOR IN THE PEDAGOGICAL TEXTS OF FREINET

The metaphoric enunciations selected by us in the pedagogical work of Célestin Freinet (1994, T.1 and T.2) are inscribed in what Nanine Charbonnel has designated the semantic-praxeological regimens (*praxéologique*) or the praxeo-prescriptive (1983, p. 158; 1991b, pp. 82-88, pp. 164-177, 1994, p. 54, 1999, p. 35) and cognitive regimens (1994, p. 56). The grammar of these regimens can be thus described: the semantic cognitive regimen expresses the knowledge of reality, the understanding of being: “When Niels Bohr said about the atom’s nucleus, around which the electrons turn, ‘it is the sun of the electrons’ [and that is true—or false]” (Charbonnel, 1999, pp. 34-35). The



semantic-praxeological regimen or the praxeo-prescriptive regimen, which is that one that expressly commands, prescribes and imposes something in relation to praxis, its enunciations

do not limit themselves in conveying an act of the language of expressivity. They do another thing: by appealing to a comparator (always heterogeneous) and valued (as in the semantic expressive regimen), they command the reader, the interlocutor, to do something in the extra-linguistic praxis. To say: “The child is a plant that needs a lot of sunshine” (Michelet) is to expressly command the father to be affectionate towards the child. (Charbonnel, 1999, p. 35)

One of the major characteristics of this regimen is that “What characterizes the comparator in the semantic praxeological regimen is that it is not only seen as similar but also as imitable” (Charbonnel, 1999, p. 54—the italics by the author). Nanine Charbonnel points out that the mechanism of the metaphoric enunciation is the same in both cases and that it rests at the basis of all metaphorical enunciation: it consists in identifying (or in making a relationship, in approximating) two entities that do not belong to the same kind provoking, in this way, a dissymmetry, because in comparing two entities that do not belong to the same kind we are making the “comparator entity the bearer by excellence of a semantic trace not ontologically constitutive” (Charbonnel, 1999, p. 34).

When Nanine Charbonnel affirms that all the written work of Freinet has, as its goal, “to induce into action, to counsel the good action” (1994, p. 51), we think that she is correct in her statement, especially with the exception of Freinet’s *Essay on Sensitive Psychology*. We agree because Célestin Freinet uses in special a lot of the agricultural metaphor in order to convey injunctions of the praxeological type (Charbonnel, 1991b, pp. 164-177, 1994, pp. 52-55). These kind of injunctions are appeals to acting properly, that is, appeals to the practice of the “good action”<sup>17</sup> and to act in the right way in the form of an advice:

we are from the beginning [referring to the book *The Wisdom of Matthew*] inserted into the universe of counselling and deontology (in order to avoid using the words either of moral—here immediately understood as moralism—, or of ethics which, incidentally, is not appropriate here). No: it is more suitable the notion of counselling (taking from Erasmus his *Boulè-Phore*: Mister Counselling Bearer, Master Adviser, what I call *boulephoric* [*boulèphorique*]) and deontology: that which I should do professionally. It is precisely what this book is about. (Charbonnel, 1994, p. 54)

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17 As an example of horticultural metaphors that are part of this regime, present in *The Wisdom of Matthew*, one may just consider the following: “Life goes always up!” (Freinet, 1994, T.2, p. 112), “To make the child thirsty” (1994, T.2, pp. 114-115) e “To go in Profoundity” (1994, T.2, p. 188).





In a nutshell, the metaphoric enunciations, voluntarily or involuntarily used by Célestin Freinet in his pedagogical work, particularly in *The Wisdom of Matthew*, incite to the “injunction to action” (1994, p. 55)<sup>18</sup>. It is in this direction that point the two first quotations that we shall shortly make and that were taken from *The Wisdom of Matthew*, while the two last quotations were taken from *Essay on Sensitive Psychology* and already tend to be inscribed in the cognitive regimen, although Nanine Charbonnel, in this case, prefers rather talk of “pseudo-cognition” (1994, pp. 55-59).

The pedagogue, like the “good gardener” who zealously cares for his plants, should behave like him when taking care of his children. Just as the “good gardener” takes care of his plants, so that they may flower and be fruitful, so must the educator be patient and wait until the child, just like the plant, may develop, grow and mature in the environment that the educator previously prepared. Just like the gardener, who must possess the necessary *savoir-faire* to choose correctly the good seeds and prepare them to be fruitful in the future, so the educator must also deal with infancy as it were a delicate seed and so help itself to build by itself its personality in the best possible conditions that necessarily include an “environment”, a “material” and a “technique” susceptible to help its formation according to its aptitudes, tastes and necessities (Freinet, 1994, T.2, p. 108). The pedagogue must be alert in order to warrant to the child the healthy conditions so that it may develop invigorated just like the fruit that has a well fertilized soil may grow stronger: “The fruit [we can also read ‘the child’] is the result of the soil [that is society-school] where it stands, besides the root, the air and the leaf” (1994, T.2, p. 108). The pedagogue or the educator has to worry about the good living conditions of the pupil (Freinet, 1994, T.1, pp. 333-339), in the same way as the gardener has to worry about the soil that received the seed:

The gardener's apprentice was proud of his melons growing vigorous and lush in shallow cavities arranged in regular lines he/she would feed abundantly with water and manure. (...) How many parents, how many pedagogues, would do as the gardener's apprentice? And place within the child's reach the food about to be eaten: rich and abundant textbooks, intensive explanations and lessons, carefully designed home work to avoid the children all futile efforts. (Freinet, 1994, T.2, p. 188)

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18 In *The Wisdom of Matthew*, where one can read *Aller en profondeur* (Freinet, 1994, T.2, p. 188), it is clear from the outset that we are immersed in a universe of counseling and deontology, in addition to the experienced observations: “And from the experienced observation comes out the injunction, the good advice” (Charbonnel, 1994, p. 54). What accentuates the effect of bouleforico and injunction is the similarity that makes the “sayings” convincing in that the various types of fruits, plants, flowers are so often described anthropomorphically).

In the same way as the plant enjoys and likes being taken care by the gardener so the pupil enjoys being guided, motivated and advised instead of being despotically forced to perform a certain task without understanding its need or even its reason (Freinet, 1994, T.2, pp. 391-392). Just like the gardener who cannot and should not use “brusque gestures that arise defence reactions” in its plants, so the educator and the pedagogue are asked to imitate the wise gesture of the gardener, because what the child needs, like the plant, is “trust, kindness, help and decision” by those who take care of the child (1994, T.2, p. 105). All those who take care of children must worry that the pupil, in order to mature, should slowly absorb the knowledge of “the school of life” (1994, T.2, p. 108)<sup>19</sup> just like the gardener worries about the seed should absorb as long as possible the humus of the soil so that it may strengthen and grow: “Let the child feel, stretch its tentacles, experiment and dig, investigate and compare, handle books and papers, dive its curiosity in the capricious depths of knowledge, in search, sometimes arduous, of the food that is substantial” (1994, T.2, p. 188). The child is like a “small plant”, both are part of life and life can only be prepared through life, as Mathieu says<sup>20</sup>. The pedagogical proposal of Célestin Freinet is based on laws that come from the tradition of the vitalistic psychology (Boumard, 1996, pp. 47-51; Piaton, 1974, pp. 173-198). The first author (Boumard) proclaims that “life is” (Freinet, 1994, T.1, pp. 335-336), and the second (Piaton) affirms the “dynamic sense of life” (1994, T.1, p. 339)<sup>21</sup>: “Education is not a school formula but a life work” (1994, T.2, p. 107).

The school should not be an abandoned garden that “does not prepare oneself for life”, but a garden where the jet of fresh water bubbles amidst the rocks (1994, T.2, p. 115). In other words, the “traditional school” thanks to a formal and passive instruction makes the students “wineskins well filled”, preventing them to contact with the fountains of life (the natural and familial environment) (1994, T.2, pp. 396-397), and preventing them to have “heads well done and dexterous hands”. That is, the “traditional school”, with its verbalistic methods that thwart the intellectual appetite of children, does not help them to build their personality and to develop and stimulate their creative and active faculties. In this sense, “good educators” should not follow the “scholastics” who let themselves “be hypnotized by those capricious lakes of observation and memory, and the formal theories heaped upon a desolate land of the old scholasticism” (1994, T.2, p. 115), and who make

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19 This “school of work” is the same as “school of the future”.

20 The theme of life is recurrent in the educational and pedagogical work of Célestin Freinet, for example: “Education is not a school formula but a life’s work” (1994, T.2, p. 107) and “The life prepares for life” (1994, T.2, p. 119).

21 It is this dedication to life, by Célestin Freinet, that allows us to say, along with Georges Piaton, that Freinet’s philosophy is steeped in naturalism and “naturism” (1974, pp. 201-205). Naturalism would allow the pedagogue to see nature as creative and restorative, i.e. as a role model for the growth and development of children. The author sought, through a natural hygiene and a natural environment, to provide students with both a physiological and psychological balance.



of the “study, copy, repeat” trilogy (1994, T.2, p. 123) its wand. This is why Célestin Freinet proposes that the “good educator” opposes the “pedagogical blasphemy”, that “scholasticism” is (1994, T.2, pp. 177-78), with a new educative cycle illustrated by “the school of work” as “the school of the future” (1994, T.2, p. 19, pp.173-174, 1994, T.1, p. 157):

If men could someday take care of the education of their offspring in the same way that the good gardener takes care of the bountifulness of his garden, they would stop following the scholars who produce poisoned fruits in their caves and lead to death both the producers themselves and those who are forced to eat the fruits. They [“the good educators”] would bravely reestablish the true cycle of education, that is to say: the choice of the seed, the particular care taken in the choice of the soil in which the individual will forever expand his powerful roots, the assimilation by the bush of the richness of this environment. Human culture would, therefore, be the splendid flour, a safe promise of the generous fruit that will ripen tomorrow. (1994, T.2, p. 108)

This type of school should elect as its main pedagogical orientation what Célestin Freinet has designated as the pedagogy of “good sense” (1994, T.2, p. 105), in order to form a subject “sufficiently strong and harmoniously constituted” like a tree which “knew how to respond to the effects of an obstacle according to its functional possibilities” (1994, T.1, p. 387):

If an individual were strong enough and of harmonious constitution, if external conditions were at best favourable, he would normally grow following his own nature and the specific laws of his constitution. He would be like a tree which grows in a blessed site, regularly exposed to the sun, well nurtured, protected from strong winds, and elevating itself on a trunk which deploys its branches and twigs according to its own allocation, in a harmony which is typically perfect. If the trunk is inclined, if some branches grow with more resolve than others, if there is an inflection toward a certain direction, this is a sign that some irregularity happened in the process of its growth and which the tree itself was able to respond to according to its functional possibilities in the face of the effects of the obstacle. (Freinet, 1994, T.1, p. 387)

For Célestin Freinet the “true cycle of education” should follow the example of the cycle of nature so that the child may develop him/herself in accordance to the specific laws of his/her formation. And so, he compares the child to a wheat grain:



A child is born and grows like a wheat grain. If the surrounding atmosphere is favourable, providing the basic elements of nutrition, neither too diluted, nor too concentrated, and is illuminated with bright light and attentive affection, the young being also grows with the utmost vitality it can muster. It then fulfils its momentary destiny which is to increase the cell number in organic harmony and to open to life. But if its organic needs are not satisfied, as its nature demands, the restless and disturbed individual stubbornly tries to find a way to compensate for the deficiencies that cause an obscure suffering. The body weakens, intelligence refrains itself, but until the last breadth of life there will be this endless effort leading to the fulfilment of an unclear but impetuous destiny. If the soil is very hard and meagre, the wheat sprout will elongate its roots unreasonably; it will deepen them doggedly searching for water and fertilizing materials; the sprout will grope, fight, it will try to go back and restart again, because it is a matter of life and death, and it is part of its nature to grow and prosper to bear fruit. (Freinet, 1994, T.1, pp. 334-335)

Based on this emblematic quotation, in *Essay on Sensitive Psychology*, we would like to underline that the use of the agricultural metaphor by Célestin Freinet, sends us to his conception of the human psychology, as Nanine Charbonnel observes: “Thus, it is not only that Freinet builds a human psychology on an image of a vegetal psychology, but, in fact, his vegetal physiology is nothing other than a disguised human psychology” (1994, p. 59). A human psychology, intimately connected to a general philosophy of life that in order to understand it better and the model of man that gives form to it, does not hesitate to use examples taken from the vegetal life; the second aspect does not compare, by the mechanism of *similitudo*, the pedagogue to the “good gardener”, but uses the *comparatio* to convince us that the child and the human organism, just like the wheat grain and the tree belong to the natural world. This is serious because it tries to establish a psychology (which has to do with the laws of behaviour) that aims to launch the scientific bases of an innovative pedagogy:

Is there a difference with *The Wisdom of Matthew*? Yes, and it is a considerable one: the gardener is no longer spoken of! We are here concerned with an *Essai de psychologie*: a very serious matter indeed. We are no longer preaching pedagogy, but providing it with foundations; thus, instead of proposing an imitation of the human (the good shepherd, the good gardener), the laws of nature must be unconcealed. (Charbonnel, 1994, p. 59)



But behind this cognitive effort (scientifically prone) visible in his *Psychology sensitive*, Nanine Charbonnel affirms that Célestin Freinet seeks to found a human psychology based on a vegetal physiology, “but also, in fact, his vegetal physiology is nothing but a disguised human psychology” (1994, p. 59). Behind this effort we would dare to say that Célestin Freinet hides his will to persuade the reader of the correctness of his psychological conception. In this respect, it is not perhaps despicable to observe that given the metaphoric enunciation, inscribed in the semantic cognitive or pseudo-cognitive regimen, that supposedly should know a determinate reality, to understand his *raison d’être* may occult a feeling (proper to the semantic expressive regimen)<sup>22</sup> or a value judgment or a prescription (proper to the semantic praxeo-prescriptive regimen), leaving the reader very often confused and touched in his affectivity (*pathos*): “To see all under the optics of affective quality, but cover all under an appeal to Nature, to the animals or to objects, such is perhaps the genial but terrible contribution of the ‘metaphorical reasoning’” (Charbonnel, 1983, p. 158).

From this, we think that beside the agricultural metaphor, which is always a metaphor of growth, in the texts of Célestin Freinet we can also stress the place that the organic metaphor (Scheffler, 2003, pp. 80-88), intimately connected to the agricultural metaphor, has in his work, particularly in his *Essay on Sensitive Psychology*. In this work, which he intends to be his scientific contribution based on psychology, he does compare the individual to a tree. As he writes:

We compare the human organism to the tree that rises from the ground, more or less vigorous because more or less well rooted and nourished, and that grows much better if it comes from a good seed, and it is grounded in a convenient soil which feeds it well. If it emerges from the soil in the best conditions, it usually organizes its life according to the laws of its kind. If the light comes to the novel plant from all sides, if no nearby tree bothers it with unwelcome contact or shadow, if no wall prevents its expansion, if no accident maims it, it will grow naturally in width and height, balanced on its trunk which hardens and gains thickness as it grows. You will see then that breathes vitality and harmony. (1994, T.1, pp. 416-417)

Thus, he seems to reclaim the same organic status for the individual and for the plant. And this seems to imply that the vegetal culture and the psychological and anthropological formation of the subject are not equivalent but walk closely. In other words, the growth of the plant is

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22 The expressive semantic regimen translates a certain feeling and also awards some value to a certain situation: “When Romeo says of Juliet ‘she is the sun of my days’” (Charbonnel, 1999, pp. 34-35).

analogous to the life and growth of an individual organism. In this way, the organic complicity established between the human organism and the plant (the tree, for example) seems evident, since the continuity of the life of the plant and of the human organism is similar: “The organic metaphor (...) leads to the comparison of the processes of acculturation to the processes of regeneration in the biological organisms” (Scheffler, 2003, p. 8).

#### FROM THE AGRICULTURAL METAPHOR TO THE VEGETAL SYMBOLISM

If the contribution of Nanine Charbonnel is original in the analysis of the agricultural metaphor based on its “semantic regimens” (1991b, pp. 128-177, 1999, pp. 34-35) under the similitude’s sign of “seeing as” (Charbonnel, 1993, T.3, pp. 99-106) and of the “it is like...” of similitude (Hameline, 1986, pp. 135-139)<sup>23</sup> (the semantic domain par excellence), however our intention is to adopt, in line with Paul Ricoeur’s theory of the living metaphor, a decisively hermeneutic perspective as we acknowledged in the first part of our work<sup>24</sup>. The reason for this option is our conviction that this approach will allow us to interpret the agricultural metaphor in a more radical way, as furthermore his study of the relation metaphor-symbol seems to indicate (1976, pp. 45-69). This radical does not mean that we will overlook the semiotic and semantic plans of metaphor, but that we only intend to find the roots of metaphor in the plan of the vegetal symbolism with its renovation rites. In other words, we defend that the use of metaphor in the texts and in the discursive practices of the educators and pedagogues should not be restricted only to a semantic type approach which makes of “similitude” (Hameline, 1986, pp. 124-127, pp. 129-139; Charbonnel, 1999, p. 33) its corner stone, or even a mere “compare to make to act” (Charbonnel, 1999, p. 35, pp. 53-59) but, on the contrary, it should serve, as Paul Ricoeur has taught us (1976, pp. 45-69), to lead us, as a lighthouse, in the direction towards a deeper, a more under and a more radical substratum, which is the umbrageous and multivocal domain of the symbol (what Paul Ricoeur has identified as “The Non-Semantic Moment of a Symbol”, 1976, pp. 57-63) and, in particular, the vegetal symbolism that, for instance, Mircea Eliade has studied so well (1994, pp. 335-41; Araújo, 2004, pp. 177-191).

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23 The agricultural metaphor is linked with similitude, as it compares heterogeneous entities belonging to different ontological genres, as exemplified by Célestin Freinet’s analogy when he compares a child with a wheat grain (1994, T.1, p. 334). The horticultural metaphor, as understood by Daniel Hameline, serves as a relevant means of expressing the analogy, the similitude between the growth of the natural plant and the growth of the child, between “The elements of the compared (the teaching) and the comparer (the feeding of the plant)” (Charbonnel, 1994, pp. 54-55). Note that we are talking about different ontological genres.

24 Cf. The metaphor and the metaphor in education in this same paper.



The metaphoric power, such as a brook, not only flows into a subterranean river called symbol but is also its symptom. Daniel Hameline, in our opinion, has forgotten that there is more in the symbol than in the metaphor because symbols, in their excess of signification rooted in a profound semantics: the oneiric, the poetical and the cosmic, “plunge their roots into the durable constellations of life, feeling, and they lead us to think that a symbol never dies” (Ricoeur, 1976, pp. 64, 53, 1988, pp. 167-186).

Thus we can realize that our hermeneutic attitude is not limited and is not complied with the semantic expressive, cognitive and praxeoprescriptive regimens of the metaphoric enunciations studied by Nanine Charbonnel in her analysis of educational texts (1991a, pp. 128-164), even though they reveal themselves heuristically useful and pertinent, but intend to go further as, for us, the metaphor functions as a kind of launching pad towards the world of vegetal symbolism with all the mythical implications that accrue from it (Araújo, 2004, pp. 169-194). In other words, we want to make it clear that, in line with Paul Ricoeur, if there is more in the metaphor than in the symbol, so there is also more beyond the semantic dimension of the metaphor and this “more” identifies itself with the vegetal symbolism which has in the symbol of the tree one of its best examples:

There is more in the metaphor than in the symbol in the sense that it brings to language the implicit semantics of the symbol what remains confused in the symbol. (...) But there is more in the symbol than in the metaphor. Metaphor is just the linguistic procedure—that bizarre form of predication—within which the symbolic power is deposited. [...] Metaphors are just the linguistic surface of symbols, and they owe their power to relate the semantic surface to the pre-semantic surface in the depths of human experience to the two-dimensional structure of the symbol. (1976, p. 69)

And this symbol of the tree articulates itself around the idea of a living Cosmos in continuous regeneration: “the tree-image of cosmos” (Eliade, 1994, p. 337); “the tree-symbol of life, of endless fecundity, of absolute reality (Chevalier & Gheerbrant, 1994, p. 89); “the tree as a symbol of the resurrection of vegetation in Spring and of the ‘regeneration’ of the year” (Bierdermann, 1996, pp. 42-46). If the vegetal symbol lacks the agricultural metaphor in order to be better looked at, it is because “There is more in the metaphor than in the symbol in the sense that it brings to language the implicit semantics of the symbol” (Ricoeur, 1976, p. 69)<sup>25</sup>, it is also true that the agricultural

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25 Hans Blumenberg in one very same line wrote: “Immediately, metaphors can be remains, rudiments in the way of myth to logos” (2003, p. 44). On the author’s theory of “metaphorologie” and its developments, see, for example, Anselm Haverkamp and Dirk Mende, 2009.



metaphor only becomes “alive”<sup>26</sup> when it absorbs and reflects the “aura” of the vegetal symbolism as “The symbol is bound in a way that the metaphor is not. Symbols have roots. Symbols plunge us into the shady experience of power” (Ricoeur, 1976, p. 69). In this sense, we defend that the agricultural metaphor can well be an open door to the vegetal symbolism as long as it is “alive” in the sense given to it by Paul Ricoeur, that is, when that metaphor produces an unexpected and unusual semantic innovation (1976, pp. 46-53), as it can also be promising from the point of view of the vegetal symbolism: “Through vegetation, it is the whole of life, it is nature that regenerates itself through multiple rhythms, it is nature that is ‘honoured’, promoted, requested. The vegetative forces are an epiphany of cosmic life” (Eliade, 1994, p. 404). In this context, accepting Paul Ricoeur’s theory that there is an osmotic relationship between the metaphor (the linguistic surface of the symbol) and the symbol (a bi-dimensional phenomenon where the semantic face does not refer to the non-semantic face) (1976, pp. 63-69), it is not hermeneutically prudent to face the horticultural metaphors present in the works of pedagogues and educators of the New Education movement as unconnected to the vegetal symbolism.

In our perspective, what we want to affirm is that the horticultural metaphors present in their works should not be seen just as mere metaphors closed to the vegetal symbolism since “vegetation incarnates (or means or participates into) the *reality* that is made alive, which creates without exhausting, which regenerates manifesting itself in innumerable ways, without wearing out” (Eliade, 1994, p. 403; Araújo, 2004, pp. 177-191). They are certain symbols of renovation, whose roots are plunged in the magma of vegetable life and why not, as would Paul Ricoeur say, “the durable constellations of life, feeling, and the universe” (1976, p. 64), which donate to the horticultural metaphor its specific semantic and hermeneutical contours which appeal, as it is known, to a purified theory of the metaphor by the *logos* which, by overcoming the semiotic and semantic levels of the metaphor, opens itself to the nourished and regenerated symbol of the “Discourse in Life” (Ricoeur, 1976, p. 59) and even of *mythos*.

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26 It comes to mind Paul Ricoeur’s *The Rule of Metaphor* (2004), while Hans Blumenberg prefers to use the concept of “absolute metaphor” identified with the myth (2003, pp. 165-170), and Gaston Bachelard uses “axiomatic metaphor” to denote a kind of metaphor of excellence and absolute, which works, so it seems to us, as one of the strongest imagination reagents alongside the four elements (earth, water, fire and air) characterized as “the hormones of imagination” (2004, p. 19). The deepest psychic structures of imagination are the archetypes. Bachelard specifically organizes much of his research around the four imaginative elements – air, water, earth and fire. Bachelard also calls the four elements “the hormones of imagination”: “They execute the great syntheses which give a little regularity to the imaginative. In particular, imaginative air is the hormone which makes us grow psychically” (2004, p. 19).





## CONCLUSION: CAN EDUCATIVE MODERNITY BE SPOKEN WITHOUT THE AGRICULTURAL METAPHOR?

In this last part, we should reflect upon what we can learn from the heuristic of the metaphor in education beyond what we already know: on one side that “It is not at all indifferent whether the pupil is compared to a receptacle that is filled or to a plant that grows”<sup>27</sup> (Hameline, 1981, p. 121) and, on the other, the metaphor, be it an agricultural one, a moulding one, a sculpture one, an organic one, a navigation one, or a travelling one, tends very often to look at us and to surprise us when we deal with education in different supports: texts, discourses, films, documentaries, interviews and pedagogical practices.

The agricultural metaphor, which took up most of our attention, very often comes close to the living metaphor which is the metaphor of invention, of semantic innovation, of creative impertinence, the one that produces a new information because it “tell us something new about reality” (Ricoeur, 1976, p. 53). The agricultural metaphor, in its quality of an “insistent metaphor”<sup>28</sup> (1976, p. 68), approaches the symbolic profundity of existence and not simply, as Daniel Hameline seems to defend, that it is about giving the first word to the “triumph of similitude” (1986, pp. 135-138), even though it can be pertinent, and it certainly is, as in the case of the use of metaphor in education:

We assume that a pupil is not a plant, nor a flask, nor plasticine, nor an explorer, nor an architect, nor raptor bird, nor a race car or a raccoon. But *comparing* a student to a plant, to a flask, to plasticine etc., or even to a raccoon allows us to consider *anything* that can be controlled and which is not a mere game or an effect of style. (1986, p. 139)

However, faithful to our hermeneutic-symbolic intention (Ricoeur, 1965, pp. 13-63; Wunenburger, 1997, pp. 76-85), we defend, as Paul Ricoeur has done before, that the living metaphor, as “insistent metaphor”, which is the case in education of the agricultural metaphor and of the metaphor of growth, cannot close its eyes to the symbols that involve and live with us, as it is the case of

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27 Never be overstated that the metaphor of the container, by making the student a receptacle and submissive and the teacher a “dumper” (dumping something in the container) consecrates the idea of Traditional School’s “well-filled head” (Montaigne) (the idea of transmitting something), while the metaphor of growth, by making the student critical of the pedagogical and participatory authoritarianism in their learning and the teacher an attentive gardener to the growth and interests of the student, consecrates the idea of the New Education’s “well-made head” (Montaigne) (the idea of participation and of “centers of interest” (Decroly): “One can not transmit, it is not possible to transmit a thought such as one transfers a liquid from a full container to another empty” (Hameline, 1981, p. 124).

28 An insistent metaphor, which really is foundational and symbolically pregnant, values the figurative sense to the detriment of the literal sense, the equivocal sense to the detriment of the univocal sense and finally appreciates the connotation which triggers subjective associations, to the detriment of denotation which favours the objective and more informative referent.



the vegetable symbolism in its cosmic, poetic and oneiric dimensions, because these dive not only into the shady experience of the cosmic, poetic and oneiric power, but they also dive in the symbolic profundities of our existence and life. Thus, the agricultural metaphor, as we defended previously, cannot close itself to “the profundity of the symbolic” (Wunenburger, 2002, pp. 43-65), even though it can say, as Daniel Hameline referred, something that can be controlled in the texts and discourses on education, but that does not mean that its symbolic meaning, by its multivocal denotation, cannot escape the simple rhetoric of meaning in order to postulate an interpretation job on the hidden meaning that quite overflows the semantic configuration of the metaphor (Cohen, 1993, pp. 58-70; Levin, 1977).

This overflowing leads us naturally to “The Non-Semantic Moment of a Symbol” (Ricoeur, 1976, pp. 57-63), summoning us in the most intimate part of ourselves, just like the roots that lovingly murmur with Gaia (the Mother Earth), and just like the trunk and branches that communicate with the goddess Eos (the goddess of dawn and of dusk, of the glow of the sun and of the nuances of the sky)<sup>29</sup>. That is the reason why Paul Ricoeur can pertinently say that “Metaphor occurs in the already purified universe of logos, while the symbol hesitates on the dividing line between *bios* and *logos*. It testifies to the primordial rootedness of Discourse in Life. It is born where force and form coincide” (1976, p. 59), and as Jean Brun could exactly write:

True symbols are not signs of acknowledgement, nor are they messengers of presence but, rather, messengers of Absence and of Distance. This is why they come to our encounter and not us who start out for them (...). Symbols are witnesses to what we are not; if we decide to listen to them it is because they come to irrigate our words with water that cannot be made to spring from any fountain. Quoting Beaudelaire, symbols look at us; whenever we feel their gaze, we have the impression of a presence that cannot be of a certain placement. This is so because symbols announce more than what they state. (1985, pp. 81-82)

In this way, the metaphors found in the pedagogical-educative texts of educative modernity, especially the agricultural metaphor interested in growth and in development, just like the symbols, announce more than they enunciate. Such was the case, in our study, of the agricultural metaphor that, in its own way, announced the way of the vegetable symbolism with all that this symbolism means in the cosmic, poetic, oneiric and existential planes.

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29 Notice that an image becomes symbolic from the moment in which through its sensitive content evokes, or suggests, a chain of images guided by a virtual meaning (life, death, peace, happiness, etc.). If one looks at the plant example, besides seeing the real vegetal species that it represents (scientific knowledge), it can also awaken in our consciousness the following: “a cozy garden or the chopping of wood in order to heat, but which can orientate next into the direction of the thought of life and even of a life with an impressive longevity, and at last towards the idea of an eternity beyond death” (Wunenburger, 2011, pp. 16-17).



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**THE ORIGINS OF THE *CITÉ UNIVERSITAIRE*  
AND THE *COLEGIO DE ESPAÑA* IN PARIS:  
ELITES, DIPLOMACY AND EDUCATIONAL MODERNITY**

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**ABSTRACT**

This study analyses the origins of the *Cité Universitaire*, Paris, based on the intellectual and educational cooperation of the League of Nations and French government after the First World War. It was in this context that the construction of the *Colegio de España* began in 1929. This Institution strengthened international relations between both countries and enabled Spanish researchers, artists and intellectuals of the time, to be in contact with the scientific, artistic and cultural advances in France and Europe. The aim of this article is solely to highlight and try to recover a part (the origins) of the political, cultural and educational history of these institutions.

**KEY WORDS**

*Colegio de España*; *Cité Universitaire*; League of Nations; University education;  
Educational modernity; International policy.



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# The origins of the *Cité Universitaire* and the *Colegio de España* in Paris: Elites, diplomacy and educational modernity<sup>1</sup>

à Mora Luna

## INTRODUCTION

It is not to the most powerful monarchs, nor to the most opulent princes, nor to the chief rulers of a nation that most states owe their splendour, strength and glory. Mere individuals are the ones who have made the most extraordinary progress in the arts, in sciences and in the art of governing. Who measured the earth? Who discovered the celestial system? Who invented those intriguing manufactures that enable nations to function? Who has laid open the secrets of natural history? Who has explored the depths of chemistry, anatomy and botany? Once again, mere individuals who, in the eyes of a wise man most eclipse the aspirers to greatness, those proud dwarves who nourish themselves on vanity alone.

Mercier, 1771, p. 225

In the aftermath of the First World War, when all that was solid melted into air (Berman, 1982), and the weakening of the Enlightenment principles led the human being to seek “a mythology that (...) might rectify society” and return its faith in the human project (Harvey, 2008, p. 51), a number of artists and intellectuals of the period appealed to the image of reason embodied in machinery, industry, technology or the city as a “living machine”; while others explored the limits of the commitment and mythologisation of the proletariat, eventually leading first to idealism, and then to disappointment. Nevertheless, at that time, establishing the bases of peaceful coexistence among the Allied Powers (mainly the British Empire, French Republic and Russian Empire, in addition to Italy, Japan and the USA) and the Central

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Powers (The German and Austria-Hungary Empires, along with the Ottoman Empire and Bulgaria) proved to be urgent, and also to reorganize international relations in order to attain understanding among the different nations and to reconstruct the European economies that had been destroyed during the conflict.

The main aim of the League of Nations (LN) was to arbitrate disputes and prevent the outbreak of new war conflicts, to guarantee human rights, collective security, and the integrity of all the states. This first inter-governmental organisation, founded through the Treaty of Versailles (1919-1920), through the International Committee on Intellectual Cooperation (ICIC), came to advocate, some years later, a cultural diplomacy with which relations among the different countries could be strengthened, and to promote the formation of an international spirit to anchor the operations of this organisation in favour of peace and progress. If the LN wanted to successfully accomplish its enterprise, it could not forego its thinkers and scholars; the very individuals who believed that the education of the elite in a unique international context was necessary to ensure the survival of a future leading class with strong foundations in dialogue, cooperation, respect and peaceful coexistence. They believed that this was the way to ensure long-lasting world peace.

#### INTELLECTUAL COOPERATION, EDUCATION AND INTERNATIONAL POLICY AFTER THE GREAT WAR

Despite the fact that the Covenant of the newborn LN, established in Versailles on 28 June 1919, did not include any article on intellectual cooperation, nor on education, some of its members, picking up on the feeling of the institutions that emerged in the late nineteenth century [such as the “Conseil permanent international d'éducation” (1885), the “Organisation internationale et collective du travail intellectuel” (1894), the “Centre consultant pédagogique international” (1904), the “Institut international pédagogique” (1905) and the “Conseil international pédagogique” (1910-1912)] believed that the new international organisation should also protect the work of its intellectuals, and consider the educational action that was being carried out in each of the member countries of the League, in order to establish an effective international policy. Fostering communication among the knowledgeable and scholarly of the period, ensuring basic educational principles and agreeing upon a conciliatory interpretation of the latest events, in order to simultaneously narrate and



construct the more contemporary history of the conquerors and the defeated (we also construct history when we narrate it and write it), could guarantee closer approximation among the nations and greater understanding among the communities.

These concerns were reflected in different proposals that were sometimes announced by LN members and frequently formulated by external institutions. Such is the case of the “Union of International Associations” (UIA), which requested help, in 1920, from the LN Council to sponsor an “international University”, with the purpose of “to form, among the chosen men in all countries who have influence on civil service, politics and education, an elite composed of thousands of minds capable of collaborating in international harmony and in the work of the League of Nations” (Renoliet, 1999, p. 13). The granting of the subsidy requested by the UIA constituted the first intervention of the LN in intellectual and educational terrain.

That same year, Paul Appel, Chairman of the executive committee of the “Association française pour la Société des Nations” and Dean of the University of Paris, also one of the “pères fondateurs” of the *Cité Universitaire*, expressed to the LN the need to support the creation of a permanent organisation geared towards intellectual work and education. This initiative, published in *L'Europe nouvelle* on 17 January 1920 and pursued by Julien Luchaire, inspector general of state education and chief cabinet secretary to the minister of education (Luchaire, 1920, p. 63), sought “to favour harmony among nations over the territory of thought, science and education, and to boost the intellectual development of mankind” (*La conférence générale et le bureau international de l'instruction & des sciences, lettres & arts, 1920, p. 63*). In the prelude, the need to bind the new body to the LN was stressed given that: “universal peace (...) will be short lived unless national education, among all its related communities, is geared towards a continuously more intimate understanding of others, and provided that the organization of schools and of the appropriate international dissemination institutions enable a far-reaching inter-penetration of intellectual environments and easy circulation of knowledge and ideas”; an idea of peace which, in his opinion, was also based on science and its progress as a remedy to overcome the poverty of the world, a permanent cause of confrontation and conflict (*La conférence générale et le bureau international de l'instruction & des sciences, lettres & arts, 1920, p. 64*).

In 1921, Léon Bérard, Minister of State Education, deemed it appropriate for Aristide Briand, Chairman of the Council and Minister of Foreign Affairs, to defend the project of Luchaire in the LN Assembly, thus launching a direct commitment to intellectual cooperation and education. (Thus far, the LN had only resolved to provide support to the various activities related to the development of intellectual cooperation, organised by the UIA). According to Bérard “that France will take the initiative to propose the



establishment of a body responsible for developing intellectual relations among the various school and university, scientific and artistic environments throughout the world” (Renoliet, 1999, p. 16) would be a motive of joy. Briand, on the other hand, considered the proposal presented by Bérard to be inadequate, and hence, the project of Luchaire “came to nothing”. In his opinion, education needed to be developed outside and beyond international intellectual cooperation if they wished to count on the support of the Ministry for Foreign Affairs.

Eric Drummond, a British diplomat and first LN Secretary-General, also manifested the importance of an intellectual and educational commitment to put in practice a more efficient international cooperation. Drummond recommended the designation of a Commission, as an advisory body of the LN Council, to study issues related to international intellectual cooperation and education.

The proposals presented by Drummond were approved both by the LN Council and the Assembly, albeit with important amendments: the Commission that was about to come into being would have to include women in its workforce and could not conduct research on educational issues “to avoid stripping censorship of its intervention in the internal affairs of the states in the field of education, and not to create the impression that the League of Nations wishes to impose an educational plan”. Therefore, intellectual cooperation at the core of the LN, would ensure the protection of intellectual workers, promote the advancement of knowledge in human sciences and aim to develop the international spirit, in addition to “a human fraternity conscience” (Renoliet, 1999, p. 19). However, after the First World War, education continued to be a “private preserve”, a national heritage unique to each State, which did not permit international collaboration nor any intervention involving experts on the issue. Indeed, education seemed to be more of “a reserved field which cannot be left solely in the hands of educators or become the object of international decisions” (Renoliet, 1999, p. 12).

All these initiatives (constructed interchangeably with varying degrees of success and failure) triggered the emergence of the ICIC in 1921 and 1922. The new International Commission for Intellectual Cooperation, with its headquarters in Geneva, was a mere advisory and provisional body at that time. Nevertheless, with Henri Bergson, Marie Curie, Einstein and Torres-Quevedo among its members, it gradually began to gain autonomy, despite the continuous obstacles presented by France and Britain.

These changes to which the LN was subject, responded to an evolution in its diplomatic policy. Whereas initially, traditional foreign policy had made it possible to consolidate peace and attenuate conflicts between

nations, in its second phase, with the inclusion of intellectual cooperation and education (as highly valuable extra-political forces in the diplomatic action paradigm) they would ensure the success of their pacifist mission. However, as already observed, educational cooperation, perceived in most cases as an encroachment in state policies, would always be far more limited and constrained than the former. International policy had no right to intervene in educational issues. Moreover, rather curiously, the difficulties encountered by the LN in order to intervene in education from an international perspective, appear to have determined the action of the French government and may even justify some of the principles of its university educational policy.

#### FROM THE FRENCH “CULTURAL IMPERIALISM”

During its initial years of activity, the ICIC re-established the connections to intellectual cooperation that had been extinguished after the war, created the various national commissions in order to identify the intellectual needs of each country, and started up the “Office international de renseignements universitaires” (to the chagrin of the French Ministry for Foreign Affairs, which opposed dealing with educational issues from an international or extra-national perspective). Nevertheless, the ICIC, as specified above, was unable, under any concept, of “interfering in university education or jeopardizing the sovereign right of states to the autonomy of high-level schools” (UNESCO, ICIC, A.61.1922.XII).

While Great Britain did not endorse the usefulness of this Commission, which, according to its judgement, solely assumed an increase in member State contributions; France (simultaneously in favour of and reticent towards international cooperation, for fear of losing its cultural prominence), tried to take control of the situation, not very successfully, in order to protect its own interests. It tried, at all costs, to boost the cultural, political and moral influence of its country, while also avoiding internationalist propaganda that was beginning to sway the ICIC towards a dissemination that would focus on the unique grandeur and virtues of the French culture. The lack of interest on the part of Great Britain in intellectual cooperation and education, coupled with the rejection of the United States Congress towards the LN and its Peace Treaty, plus the systematic exclusion endured by Germany by the other member countries of the afore-mentioned international organization (it would not be included until 1926) enabled France to emerge as the cultural standard bearer and educational model during the inter-war period.



In addition to its own national intellectual commission (national commissions that began to take root as of 1922 in the countries of Central and Western Europe), the French government asked the LN to form a Committee, according to unofficial reports, to reinforce its influence in the cultural environment, and also to safeguard its political interests. This Committee was not meant to be solely concerned with establishing contact between the ICIC and the French intellectual sphere, but also entrusted with protecting the cultural imperialism of its country. This project was accomplished by the French government, despite the significant financial crisis of 1924, as, according to Luchaire:

intellectual growth has become one of the main issues of the external programme of France (...) if France, following an ancient tradition, presents itself as a more gifted nation to understand the intellectual effort of all others, in order to act as a meeting place for its various products, to harmonize them on the basis of genius, and to transfer them, in their transformed state to common human heritage; if France organizes itself, following modern methods with sufficient means to be the main and most prestigious centre of international intellectual cooperation, then its influence will, so to speak, be boundless. (UNESCO, IIIC, A.III.s)

In the intellectual, scientific, cultural and educational terrain, France feared German revenge, thus, constantly feeling the need to assert its superiority. This superiority was not only conveyed from a purely “intellectual” perspective, in the strict sense of the word, but also, in our opinion, was implemented from a far-reaching “cultural” stance. Hence our choice of the concept “cultural imperialism” over “intellectual imperialism” in the development of our critique on French practices during those years. The hard work of its political and diplomatic representatives to demonstrate the supremacy of the French language, thus preventing it from being replaced by Esperanto as the international auxiliary language of the LN, was a prime example of this effort (Chaubet, 2006). Defence of the French university model over the Humboldtian or Anglo-Saxon models are also good examples for showing its prominence and superiority.

The new orientation of its foreign policy, following the victory of the Socialist Party in April 1924, which renounced the use of force in favour of culture as a diplomatic weapon, made the inauguration of the International Institute of Intellectual Cooperation (IIIC) possible (institutional antecedent of UNESCO, a specialised agency of the United Nations for Education and Diversification, Science and Culture), an executive body of the ICIC, with its headquarters in the Palais Royal of the French capital. This immediate action instrument of the

International Commission was totally subsidised by the French government (although it was an organisation dependent on the afore-mentioned Commission and, consequently, the LN Council and Assembly) whose aim was to contribute selflessly to an understanding among the communities, at least this is what the official discourse of the government implied.

This gesture of generosity was initially met with some reticence: “one believes that it conceals a highly ingenious form of intellectual imperialism”. Nonetheless, the trust France inspired in them and the promise that the Institution would be an international body in every aspect, with the exception of the economic, dissipated doubts in Geneva, while they knew fully well that it would be difficult to bypass the influence of France on its own functioning. There was “an intellectual preparation task for the general organization of the world” and France felt responsible for ensuring its accomplishment “in the best possible and most far-reaching conditions”. The ICIC was required to draw up regular statistics on the movements of intellectual life, and to study the organisation’s potential problems; to establish contact with renowned institutions and international scientific associations, to coordinate its efforts and support its activities; to organise literary and artistic production, and to promote arts in general; to connect worldwide institutes “de haut enseignement” (when the inter-university relations Office was transferred to the Parisian Institute); and, from a legal perspective, to address the material situation of the intellectual workers (UNESCO, IIC, A.I.2).

In the mid 1920s, France wished to be the intellectual and cultural centre of the world. In order to accomplish this aim, the creation of the ICIC was not sufficient. Although the Institute had reasserted its centrality as a political and cultural player within the scope of the intellectual on a world-wide scale, its new diplomatic initiative required being involved in educational issues in order to attain the “imperialistic” goals proposed by the government. It was at this point that the decision was made to construct an exceptional university campus to bring together and “educate” the future governing elite (of the West and the whole world), in accordance with its principles and cultural models. From then on (and up to the outbreak of the Second World War), the French capital also played a leading role in educational terms. France came to occupy the gap left by international policy when the international organisations (essentially by order of the French Minister for Foreign Affairs) decided not to intervene in educational policies to the serious and committed extent they had wished for (the fact that neither the ICIC nor the IIC were permitted to intervene in education has already been mentioned).



## THE *CITÉ UNIVERSITAIRE* OF PARIS. A UNIVERSITY CAMPUS FOR PEACE AND OTHER PURPOSES

Although we are unable to demonstrate a direct connection between the LN and the *Cité Universitaire*, available data, up to now, has revealed a relationship between the institutional projects and the presence of some equal ideological principles. It was precisely in the midst of this political and diplomatic scenario that the construction of the *Cité Universitaire* commenced, in the 14<sup>ème</sup> *arrondissement* of Paris—on the former fortifications of the city. The *Cité Universitaire*, an extraordinary architectural and educational complex designed, according to official discourse, to accomplish the most honourable utopia; a utopia that even escaped the LN and its domains: “no place would be more propitious for the formation of an elite, capable of conceiving the diversity of national minds and temperaments, of dissipating all misunderstandings stemming from mutual ignorance, and of establishing through the countries a place of trust, a community of intelligence, among future governments and opinions” (De Jouvenet, 1927, para. 5). The desire, or at least the official discourse of politicians, intellectuals, businessmen and sponsors of the neighbouring countries was to achieve the peace and security of the world through education, science and culture, as another acceptable myth to recover trust in human beings.

The *Cité Universitaire* of Paris, established by law on 28 June 1921, was born from pacifist ideas (Ingram, 1991; Vaïse, 2004), and hygiene concerns (Viñao, 2010) typical of the modernism of inter-war-periods and solidarity-based liberalism. This international university campus had, on the one hand, the task of ensuring peace among communities, thus reinforcing the LN project, and on the other to contribute to the international projection of France, and the consolidation of its cultural and political influence. Education and culture, fundamental instruments of French diplomacy after the First World War, came together in the *Cité Universitaire* to constitute an international community that would remedy all the errors made in the past.

Paul Appell, Dean of the Academie de Paris and Chairman of the executive committee of the “Association française pour la *Société des Nations*”, André Honnorat, Minister for State Education, also senator and first Chairman of the *Fondation Nationale pour le Développement de la Cité Universitaire*; Émile Deutsch de la Meurthe, businessman and first sponsor of the project and David-Weill, banker, sponsor and first treasurer of the *Fondation Nationale* in 1925, conceived an international university campus, a dormitory campus, an American style park campus as a reaction to the disaster experienced of the Great War, and as a solution to the problems of accommodation of the French universities and those arriving from other parts of the world.



Of the 22,000 students enrolled at the University of Paris in 1925, 3,300 were foreigners. These youths, the majority from poor or “formerly rich” families, lived in hardship, and so felt obliged to “finding a few hundred Francs in mercenary work so that the parents, confronted with difficulties, may send them each month” (La Cité Universitaire de Paris. Pour la jeunesse de nos écoles, 1925, p. 3). Before this situation, Émile Deutsch de la Meurthe, “a man of great generosity” donated “to the University of Paris, the sum of ten million Francs to accommodate poor studious youths” (La Cité Universitaire de Paris. Pour la jeunesse de nos écoles, 1925, p. 4). The donation encouraged other French and foreign donations until 1938, when a university campus with twenty halls of residence was configured: the Fondation Deutsch de la Meurthe was inaugurated in 1925, Canada launched its premises in 1926, Belgium-Luxembourg in 1927, Argentina and the *Institut national agronomique* in 1928, Japan celebrated its opening in 1929, Armenia, Indochina and the United States in 1930, Sweden in 1931, Denmark and Greece in 1932, Switzerland, Cuba and the *Maison de Provinces de France* in 1933, Spain opened its doors in 1935, the Honnorat residence in 1936, Great Britain and Monaco in 1937, and in 1938 the house for students from the Netherlands [Figure 1] was inaugurated. This important initiative assumed a starting point for “a crusade to improve the moral and material standards of living of the youthful elite” (La Cité Universitaire de Paris. Pour la jeunesse de nos écoles, 1925, p. 4), pursuing three very clear objectives: first and foremost, “offering the students, men and women, secure accommodation at a good price”; secondly, they set out “to give these youths the habit and taste for hygiene and a social life”; and finally, “to teach these students, from different horizons, to live together” (Institut français d'architecture, 1995, p. 47). However, in the opinion of Kévonian and Tronchet:

The notion of an “ideal of the City”, this approximation of the elite of all nations to the heart of a common home of intellectual life, from which would stem a mutual understanding among the nations, so as to establish peaceful international relations, is not the *essence* of the City, but rather a discourse—among others—conveyed by the elite who, on the other hand, may do something else to the City and not what they set out to do, projected within the heart of a social space that will know—being international—how to establish axiological neutrality. (2013, p. 27)

Besides the official pacifist discourse that surrounded its construction and the pragmatic response underlying this urban complex and the housing needs of the young students, the *Cité* did, in fact, qualitatively improve the offer of education the University of Paris proposed to the international university market, during which period the education of its elites was challenged (Karady, 2013). The creation





of the *Cité Universitaire* reaffirmed the excellence of the French university model (questioned at various stages of the nineteenth century by Germans and Americans) and turned the French capital into the most desired academic destination of students from all over the world, including German students:

One purpose of the *cité universitaire* was to encourage students to study in Paris to reinforce French success in surpassing the Germans on the intellectual and researched-based scientific forefront. (...) Cross-cultural participation demonstrated the success of international education if students from an “enemy” country would choose to study in France. In 1910, 363 Germans attended French universities. In 1926, seven years after the Treaty of Versailles, 500 Germans were enrolled in French schools. (Reis, 2010, p. 159)

Internationalisation of the French linguistic and cultural model and its universalist vocation reaffirmed the “imperial nation” concept, practised by French politicians, intellectuals and educators during these years. This nationalism, more typical of the nineteenth than the twentieth century, also left an interesting ray of hope that was not specified in its *curriculum* for other less imperialistic knowledge. This student Babel (which, during the inter-war period used the French language predominantly and ended up apprehending and importing the symbolic assets of its culture-just as the French government had proposed), was also meant to be a conducive space to all types of cultural exchange and transfer, for the export of other knowledge, other languages, other learning experiences and other ideologies that were not included in the official *curriculum* of university teachings:

National pride through scientific superiority did not destroy scientific exchange. Cultural internationalism aspired to introduce a non-nationalist curriculum to teach students about shared traits rather than indoctrinate them with patriotic pride. However, nationalism did not suddenly disappear with the birth of this movement. After the First World War, strong patriotic ties remained at the forefront of people's belief systems and education continued to teach the greatness of one's heritage. Comparative nations learned from one another and interacted, even if it was merely an attempt to outdo one another. (Reis, 2010, p. 159)

As far as the construction of the *Cité Universitaire* of Paris is concerned, “one of the centres in which tomorrow’s world is constructed”, according to Paul Hazard in *Les Nouvelles Littéraires* (1930, p. 1) the decisions of the French government have a



two or three-fold interpretation. On the one hand this university campus was part of the LN project and its ideal of peace as the official discourse (Sereni, 1992), while simultaneously on the other, it served to reinforce the presence and cultural and political influence of France abroad. *Mutatis mutandis*, the task of the IIC and the mission of the *Cité Universitaire* were not so far apart. Although it is true that the latter involved a new kind of cultural internationalism during the inter-war period, it is also true that it emerged as a diplomatic weapon of extraordinary value for France: “despite this awareness of and interest in cultural internationalism, French educators and public figures continued to view their culture as worthy of emulation. The French creators hoped to convince the public of the universality of French culture and the excellence of French education” (Reis, 2010, p. 157); by the same token, this university campus may also be interpreted as “une école pratique” of international relations, that is to say, as a governmental player in the integration of worldwide university elites through the diplomatic exercise of soft power (Kévonian & Tronchet, 2013, p. 31).



Figure 1. The various halls of residence of the *Cité Universitaire* under construction. Fragment of a newspaper report published in the French press. Unknown origin (circa 1932). In the photographs, the stage of the works on the *Colegio de España* (Spanish), the *maison de la suede* (Swedish), the *Fondation Hellénique* (Greek), *Fondation Danoise* (Danish), the *Maison des Étudiants Arméniens* (Armenian) and, finally, the *Maison de Cuba* (Cuban) may be observed (ACE, 148/1).



FOUNDATION OF THE *COLEGIO DE ESPAÑA*  
IN THE *CITÉ UNIVERSITAIRE* OF PARIS

On 23 February 1925, the Ministry of Finance for Foreign Affairs, at the desire of the Spanish government, sent a draft decree to the Spanish Embassy in Paris, in which the French obligations and commitments of the pedagogical, diplomatic, political and cultural enterprise, the so-called *Cité universitaire*, were duly specified. A brief and general description of the project was also sent, with its location, size (9 hectares at first), the various point of access and connections to the city, the payroll of the various halls undergoing construction and the different countries “en pourparlers” with the University of Paris. By building a “maison”, a hall “pour étudiants” within the enclosure of this university campus, would ensure Spanish presence in the intellectual cooperation and international policy and would contribute to the regeneration of Spain and its image abroad. Furthermore, it would enhance the “imperialist” political and cultural project of the French government.

In order to participate in the innovative urban and academic proposal that was being built in stronghold 81, 82 and 83 of the former fortified enclosure of the French capital, the Spanish government was required to fund the construction of a property designed to house students on these grounds; seeking to provide them with “healthy accommodation at a moderate price (...) in the best possible conditions of material, intellectual and moral standards of living” (Arrêté autorisant l'accession au bénéfice de la Cité universitaire, 23 February 1925, [ACE, 148/1]). Once the decision had been taken, the government of King Alfonso XIII was simply required to send its proposal to the *Académie de Paris* so that Spain could enter the centre of this international cultural universe, much longed for by most of its intellectuals (especially the scholars and intellectuals, modernists and *noventayochistas* [generation of 98], who thought of Europe as a remedy for the national decadence into which Spain had plunged after the “colonial disaster” of 1898). However, and despite the fact that on this same date the Embassy of Spain forwarded the received documents to the cultural relations office in Madrid, the Spanish had to wait until 25 June 1927 for the King, accompanied by José María Quiñones de León, the Spanish Ambassador in the French capital and member of the executive council of the LN at the time, to visit *Cité Universitaire* with a view to personally choosing the location for the construction of the Spanish hall of residence, and to take possession of the land deemed appropriate for its construction by the Monarch. The



King was welcomed by Honnorat and Benet, respective Chairman and Secretary of the *Fondation Nationale*. The event was deemed historic for the University of Paris and served, as stated in the telegram sent by André Honnorat to Eduardo Callejo de la Cuesta on the day of the royal visit, to narrow the gap between the spiritual relations of the elites of the countries even further (Telegram from André Honnorat to the Minister of State Education in Spain, 25 June 1925 [ACE, 148/1]).

After the event, it was determined that the Spanish hall of residence would have a hundred rooms for students and researchers; a few days later, the king (perhaps impressed by the British and American proposals), considered this to be insufficient. Finally, Alfonso XIII increased the capacity of the Spanish “maison” to accommodate up to 150 residents of Spanish, Brazilian or Portuguese nationality, or from any Hispanic-American country without representation in the *cit * (*La maison espagnole   la Cit  Universitaire*, 1927, para. 2). It should be noted, in relation to this event, that the Argentinean hall of residence was inaugurated in June 1928 and the Fundaci n franco-cubana Rosa Abreu de Grancher opened its doors in 1933, the other halls for the accommodation of Latin-Americans, were only built after the Second World War (Mexico, 1953; Brazil, 1959; Portugal, 1967), therefore, amplification of the Spanish building was perfectly justified.

Some months later, on 18 October, “by order of His Majesty King of Spain”, a Commission was created under the State Ministry, to “construct, install and equip the services of the *Colegio de Espa a* in the enclosure of the University Campus of Paris”; this commission was composed of “His Excellency D. Jacobo Fitz James Stuart y Falc , Duke of Alba and Berwick; His Excellency the distinguished Ambassador of His Majesty in Paris, and last, but not least, the illustrious Director General of Higher and Secondary Education” (Real Orden 1284 de 18 de octubre de 1927, 1927, p. 413). This means that the Duke of Alba, Qui ones de Le n and Wenceslao Gonz lez de Oliveros were entrusted with constructing and starting up the *Colegio de Espa a* until its normal functioning, the former the Chairman of the Commission and Qui ones de Le n permanent delegate general of Minister Callejo in Paris and the Commission.

On 8 November 1927, Qui ones de Le n established an agreement to construct the *Colegio* in the *Cit  Universitaire*. This event, as may be observed in the telegram sent by the Minister of State Education, Callejo de la Cuesta, to the Spanish Ambassador in Paris [Figure 2] and in the telegram sent by Andr  Honnorat to the Chairman of the Spanish Council, was of utmost importance for the “spiritual approximation of both countries”:



As the Ambassador of Spain has just signed the deed for the Spanish foundation in the University Campus, I wish to extend to Your Excellency my personal gratitude, and my respectful regards to His Majesty the King, for such joy resulting from this great event. I am sure that 8 November will be a memorable date in the history of the spiritual relations that unite these two countries. (This telegram was published in *La Nación* on 9 November 1927 [ACE 148/2])

“The People and the Spanish government”, as the Chairman of the Council wrote in his response telegram to the Chairman of the *Cité Universitaire*, a symbolic union of the two countries had taken place which would now serve to strengthen even further their affective ties, using the “essential cultural feature” (El Colegio Español de la Ciudad Universitaria de París. Notas de ampliación, 1927, para. 6) as a pretext.

However, the other side to the story of the construction of this hall of residence dates back to the Spring of 1916, when five French academics travelled to Spain with the purpose of showing the locals the greatness of their country (Delaunay, 1994). Once in Madrid, in the presence of the Spanish aristocracy and many other “illustrious people”, “one of them, Ch. M. Widor, an illustrious composer, ends one of his conferences expressing his wish for the French artists and intellectuals to go in mass to study in Spain” (Niño Rodríguez, 2005, p. 68). Alfonso XIII, in response to the wishes of France, decided to grant the *Académie française des beaux-arts*, free usufruct with indeterminate duration, 21.600 square metres of the Moncloa (the area upon which the University Campus of Madrid would be built) for the construction of the *Casa de Velázquez*. This *Casa*, founded by law on 18 April 1920, in the same way as the Schools of Fine Art of Rome and Athens, would enable the French artists and intellectuals to complete their studies in the Spanish capital. Barely a few months later, construction works began, and thanks to the support of several French sponsors, the building was partially inaugurated on 20 November 1928 with the most solemn of ceremonies. Total inauguration of the project was accomplished seven years later, on 14 May 1935. The *Casa de Velázquez*, that was part of the strategy to fight against “the force of Francophobia that arose during the world conflict” (Niño Rodríguez, 2005, p. 69), found its Spanish counterpart in the French capital. The so-called *Villa Carpeaux*, seed of the *Colegio de España*, was to be, as had initially been foreseen, the satellite of the Fine Arts Academy of San Fernando in the city of light. Nevertheless, the project underwent a number of transformations until the *Casa de Velázquez* found its kindred, the *Colegio de España*, in the university campus of Paris, some years later.



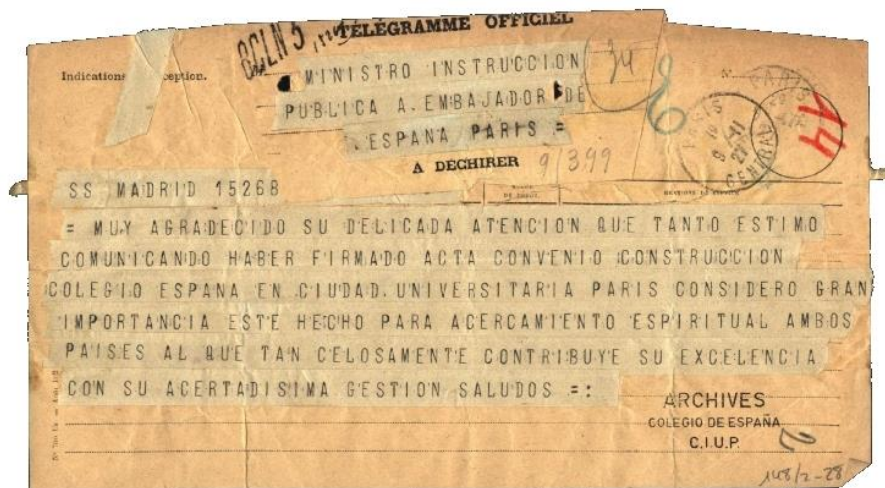


Figure 2. Telegram from the Minister of State Education and Fine Arts, Eduardo Callejo de la Cuesta, to the Ambassador of Spain in Paris, José María Quiñones de León, after the establishment of the agreement with the *Fondation National* of the *Cité Universitaire* on 9 November 1927 for the construction of the *Colegio de España* in Paris (ACE, 148/2).

## THE *COLEGIO DE ESPAÑA* IN PARIS AND THE UNIVERSITY CAMPUS IN MADRID

The Spanish hall of residence was the target of criticism, not only due to its modern and accurate architectural design by Modesto López Otero or to the comfort of the premises, but also as it was the first “maison” funded entirely, according to what may be read in the French press in the early 1930s, by the public funds of a government. However, as one may read in the daily newspaper *ABC*, this hall received a number of sponsorships for its construction, by individuals who were attracted by the prestige and social standing underlying their donations.

In May 1926, the entrepreneur Guillermo Solms donated “the sum of one hundred thousand francs” to start the construction of the *Casa del Estudiante español* in Paris, referred to as such from then on. This donation “deserves a two-fold applause”, according to the journalist, and perhaps also an opinion shared by the governmental leaders committed to the cause, since it not only represented a generous contribution, “but also a stimulus so that individual initiative may flow towards this beautiful accomplishment”. Quoting the same article, “in order to enable the Spanish colleges of higher education to send their students to the fruitful conviviality of the university *cité* of Paris, these initial contributions will be reflected in an individual donation. Therefore, when the works are



under way, our Government, which regards this enterprise with the interest and kindness it deserves, may make its protection effective” (La Casa del Estudiante español en París, 1926, p. 23).

From our perspective, the propaganda for the collection of funds that involved the publication of the article was a means to meet the financial difficulties of the Spanish government to tackle not only the construction of the Parisian project, but also to lay the foundations for its own university campus, in Madrid. To such end, the delegated Commission tried to reduce the size of the building: of the 150 rooms agreed upon after the first royal visit, and an attempt was made to return to the 70 or 80 rooms designed in the first draft. However, the commitments established with the *Cité* and with André Honnorat, made it impossible to change the project. While the public treasury did not permit further expenditure, the continuation of private funding appeared to be the only solution. A number of funds that had been channelled by a new commission presided by the Count of Romanones and composed of Solms, the Duke of Alba, Doctors Recaséns and Aguilar, the Marquis of Valdeiglesias and a gentleman by the name of Buendía (La Casa del Estudiante español en París, 1926, p. 23).

Although we do not know the amount of funds collected by this illustrious commission to start the construction works, it is known that the delegated Commission later created by Alfonso XIII, in October 1927, for the management and inspection of the *Colegio de España* construction works (composed by the Duque of Alba, Quiñones de León and Wenceslao González de Oliveros) left office on 19 November of that same year. Primo de Rivera then commissioned the Cultural Relations Board, under the Ministry of State “to perform the construction and implementation services of the *Colegio*”. The dictator provided the Board with a subsidy of 250.000 pesetas to start constructing the building (Real Orden 1424 de 10 de noviembre de 1927, 1927, p. 845); a construction estimated at two million pesetas (some eight million francs at the time), which did not begin until 1929 (Sazatornil Ruiz, 1995).

The university campus of Madrid, the great work that would commemorate the twenty fifth anniversary of the reign of Alfonso XIII, overshadowed the Parisian project. In the words of Jiménez Fraud:

the huge University Campus enterprise, patronized by the King (...) undoubtedly involved a reform of University life, entirely enclosed in unsuitable buildings, in narrow and noisy parts of the centre of the capital and lacking space so that the physical life of the students might develop, at least with basic hygiene conditions (...). The enterprise, however, deserved all kinds of praise. What was



reprehensible was the luxury it was intended to display and, above all, that attention be paid exclusively to the size of the buildings and their luxurious decor, without, deliberately, paying any attention to the internal reform of the University. (1971, pp. 469-470)

Alfonso XIII was constructing a monumental work in the Moncloa, inspired by the American university model in order to upgrade the unwieldy Spanish university of those years. However, in the eyes of Jiménez Fraud and the other institutionists, this great work was devoid of a pedagogical renewal on which it could be founded. “Suspicion increased when it was verified that those in charge, particularly the members of the Construction Board of the University Campus, were individuals with no connections to the ILE or the JAE, the most vehement promoters up to then of the university reform” (Niño Rodríguez, 2013, p. 86). According to the researcher, “it was not right that the University Campus project should be limited to constructing ostentatious buildings and imitating the style of the American university. It should also be concerned with suitably preparing future teachers” (Niño Rodríguez, 2013, p. 87).

For some, the University Campus of Madrid “is [was] far more urgent than the guest house for pensioners abroad, and could have been perfectly well replaced by the numerous hotels in the *barrio latino*” (La Ciudad Universitaria, 1929, para. 5); while for others, “the idea of building a house for teachers” in the *Cité Universitaire* of Paris called for a new impulse “so that (...) the commitment voluntarily undertaken by our Country to collaborate for a most worthy enterprise entrusted with protecting education and disseminating science is [would be] accomplished” (España en la Ciudad Universitaria de París, 1929, p. 21).

The King silenced the rumours and tempered the diplomatic relations with the *Fondation nationale* when, accompanied by the Duke of Miranda, he visited the French capital in the summer of 1930 (Le roi Alphonse XIII et M. Doumergue ont déjeuné hier à l'ambassade d'Espagne, 1930). He returned again in March of the following year (La Junta de Relaciones Culturales. España en la Ciudad Universitaria de París, 1931). However, and despite his repeated trips to Paris, the work was not progressing quickly enough, the deadlines had been extended and surpassed over and over again, and the funding required to complete the construction was more than the State could afford at the time (ACE, 148/6).





## CHANGE OF REGIME AND INAUGURATION OF THE *COLEGIO DE ESPAÑA* (OR WHEN SPAIN ENTERED EUROPE)

With the arrival of the Second Republic on 14 April 1931, and after confronting a number of problems (including raising the issue of whether to surrender the building of the university of Paris, given the lack of means to complete the works (ACE, 149/2), the institutionists took charge of the educational projects in progress: they continued the works of the University Campus of Madrid, extended the reform that the Central University had prepared in 1922 to the rest of the Spanish universities, and successfully completed the construction of the *Colegio de España* in the *Cité Universitaire* of Paris with Jiménez Fraud leading the way as Director of the Student Residence Hall; in other words, Jiménez Fraud performed the duty of technical director of the Students Residence Hall and the Fundación del Amo in Madrid, and the *Colegio de España* in Paris. “Thanks to the support of the dean of the University”, says the institutionist, and thanks to the support:

of the outgoing secretary of the University campus, Dr. Aguilar, and the incoming secretary, Dr. Negrín, and the help from the Board of Cultural Relations of the Ministry of the State, of the architect of the *Colegio de España*, and thanks also to my dear friend Don Fernando de los Ríos for the consignments that led to the budget so that the works on the *Colegio* in Paris could be completed, and who reorganized the internal life of the Foundation and gave the last boost to the construction of the *Colegio de España*. (Jiménez Fraud, 1971, pp. 474-475)

Very concrete teaching and educational tasks were assigned to these three institutions. The ultimate goal was to form a class of directors that could pull Spain out of the “decadence” and backwardness in which it was immersed in relation to Europe, so as to embrace modernity. To this end, they counted on Ángel Establier and Andrés León, “two highly efficient individuals for their posts, with broad scientific knowledge and training and who identified totally with the ideals of the Hall of Residence” (Jiménez Fraud, 1971, p. 475).

Hence, in 1932, Alberto Jiménez Fraud began to work in close connection with Ángel Establier, a chemist and pharmacist, head of the Scientific Department of the IIC and LN at the time, to prepare the *Colegio de España*.

As may be observed in the correspondence between these two institutionists (ACE, 3/1), a correspondence in which “ordinary life” predominates, if, with this term, a second start up of the Students Hall of



Residence is being referred to, the *Colegio de España* implied a continuation of the institutionist project in the French capital.

In the daily correspondence taken and brought to and from Paris and Madrid in the diplomatic pouch, the “selection and reform enterprise” (Jiménez Fraud, 1971, p. 476) was made known, referring to a future leading class and a Spanish university that had already inaugurated the Student Hall of Residence in Madrid in 1910. However, one may also read the personal commitment to this cause of those who took on such projects since seemingly, at that moment “the most anguishingly pressing issue was to form a conscious, educated and loyal class of directors” (Jiménez Fraud, 1971, p. 436) which would inherit a project called Spain.

Jiménez Fraud intended to contribute by educating the students of his hall of residence, who were guided by public and civil values, transmitting to them that they would be capable of accomplishing that which the historical destinies of the race required of them with dignity.

The first schoolboys were admitted in October 1933, although the works had not yet been completed. Among the different tasks expected of the house director, Establier manifested in his correspondence with Jiménez Fraud, were his responsibility as tutor and counsellor in the academic trajectory of the residents. Some tutors were entrusted with the task of “deliberately and competently transmitting the cultural heritage that is passed from generation to generation, the features of liberal education, without which the university function is sterile” (Jiménez Fraud, 1971, p. 488). On 15 December 1933, Jiménez Fraud wrote the following to Establier:

I am extremely happy to hear that the *Colegio* is functioning well. You tell me that “every, or almost every night I leave the parlour to talk to the residents for a few minutes”, “Is that the only time you see them, or do you also see them during the day? Otherwise those relations appear to me to be insufficient. If you can give me more details on this matter I would be extremely grateful, as the entire success of this venture will depend on the daily and extensive relationship you maintain with the residents. Please forgive my persistence, but you already know how much I hold you in esteem and regard you as fundamental, in fact as the only fundamental one in the Hall of Residence. (ACE, 3/1)

The start up of this institution went from strength to strength, moving forward with the wind in its sails: the works progressed at great speed, Establier had considered the possibility of putting some money into making a library, they organised the first guided tours and excursions to the museums of the Louvre, Carnavalet, Cluny, Rodin, and to various laboratories and factories; they even planned a visit to the Natural



History Museum, and the residents began to organise the first scientific dissemination workshops.

Its official opening was postponed, for a number of reasons, until the spring of 1935. The inauguration, instigated by the Spanish government and the Spanish Ambassador in Paris, Juan Francisco Cárdenas, also counted on the presence of the French President of the Republic, Albert Lebrun; Sébastien Charlety, Council Chairman of the University of Paris; André Honnorat, Chairman of the National Foundation in the *Cité Universitaire*; Ramón Prieto Bances and André Mallarmé, Ministers of Spanish and French State Education, and José Prieto del Río, at that time Consul-General. Ortega y Gasset, Juan de la Cierva and López Otero were among the illustrious guests of the Spanish delegation who attended the event on Wednesday, 10 April. An event that congregated around five hundred people (among them the almost fifty resident students of the *Colegio* at the time). Gregorio Marañón, Ramón Menéndez Pidal, Manuel de Falla, Assín Palacios and Jacinto Benavente, although they did not attend, were also invited to the celebration.

Miguel de Unamuno “was to give a conference” on Thursday 11 April (Unamuno, 2014) and Blas Cabrera, father of physics in Spain, Vice-Chairman of the Cultural Relations Board of the Ministry for Foreign Affairs and Chairman of the Spanish Delegation, would also give a conference on Saturday 13 April. On Friday 12 April, the anniversary of the Second Republic was celebrated in the Spanish Embassy and, given the festive events of those days, an exhibition was launched on the engravings of Goya in the National Library of Paris. Sunday 14, as a final touch, the *Colegio* celebrated a gala ball. Finally, in order to continue to celebrate the inclusion of Spain in this international intellectual and political universe, the works of Dalí, Miró, Picasso, Juan Gris, Bores, Castellón, Gargallo Gerassi, González, Bernal, González de la Serna, Junyer, Gregorio Prieto, Viñes and María Blanchard were exhibited from 24 May to 13 June. This was the first, and undoubtedly the most remarkable exhibition of Spanish painters organized by the *Colegio* to date.

The “grandiose” participation of Spain in the *Cité Universitaire* was, in the opinion of Cabrera, the best contribution to the formation of a comprehensive human spirit, the unification of the soul of the communities and the maintenance of an unshakeable peace. In the eyes of the physicist, the *Colegio* also made the reincorporation of Spain in the scientific world possible “in order to accomplish—after a long interruption caused by the various battles sustained by our country—the work of the *Junta para Ampliación de Estudios* [Council for the Expansion of

Studies] presided by our fondly missed Cajal, to be able to clearly judge our abilities in the study of physics” (ACE, 1/1).

“The destiny of Spain and the universality of its language” was the title chosen for the intervention of Unamuno, “a kind of 'spiritual testament' of the old intellectual”, according to Rabaté (Unamuno, 2014, p. 26) in which he invites his audience to embrace the universal to feel the national. The *Colegio de España* in Paris had been constructed, in the opinion of the writer, “to win over (...) the French to the Spanish language and at the same time, here it is!, winning the Spanish over to the French language”. For Unamuno, the knowledge of others, the different knowledge, can give us the key to our personal and intimate knowledge. Only thus, and by means of this “reciprocal conquest can one reach true universality, which is above all that is not common to us, embodied in that which is our best, the eternal us we want to be, even if we do not get there” (2014, p. 59).

According to Magalhães “the representation of education involves a systemic notion and intellectuals can function as a system. They configure and demarcate the educational field” (2016, p. 303). This is the perspective we ought to adopt in order to read and interpret discourse and all the demonstrations that were carried out during the construction and inauguration of the Spanish hall of residence in Paris (however a more lengthy analysis would require more pages and another space). Some of the intellectuals of the Generation of 98 and the Generation of 14 met in that exact location to bring feeling and meaning to the event. Those intellectuals also represented education and were unable to ignore it, although it was disguised as a political, diplomatic, or cultural act; since, as well noted by the author, the intellectuals “represent education in a full sense, as they prefigure the different acceptations and, fundamentally, because they ensure the relationship between education and society” (Magalhães, 2016, p. 303).

Most of the Spanish and French newspapers paid great homage and offered words of kindness to the *Colegio de España* and its inauguration. However, in *El Debate*, Antonio Bermúdez Cañete claimed that the republican celebrations around the recently opened hall of residence would not have been possible if the government of Alfonso XIII—with the Duke of Alba and Quiñones de León leading the moves, had not made a commitment to the French government for its construction three years later. The University Campus of Madrid and the *Colegio de España* in Paris, “a true University, guest house and classes”, are, according to this critical journalist “daughters of the Spain of today. But a today a little more like yesterday than the vision which the radical socialists both here and abroad currently have” (Bermúdez Cañete, 1935, para. 10).



Mariano Daranas, press correspondent in Paris for the daily *ABC* [Figure 3], writes that the inauguration took place in an environment of “anti-universality” and “anti-university” in view of “the offensive of the native school census against the foreign students”. Those “outsiders” were being criticised and vetoed for “infiltrating”, having completed their studies in Sorbonne, in the liberal professions and technical services of the French state, leaving doctors and engineers without jobs. According to the journalist, the Hispanic-American students asked the Spanish and Italian governments to transfer their records and to validate the subjects passed in the university of the capital, so that they could complete their studies in one of those countries. He praises the construction of the Spanish hall of residence effusively, whose layout and spatial planning “fortunately turn their backs on the conceptions that inspired other halls of residence”, and reflects upon the construction of López Otero, extolling its monastic, military and civil appearance, regarded as a representation of the Spanish character abroad and as a “lesson of eternity”. However, the Spanish journalist criticises the French *Cité Universitaire* project because “neither plastically, nor spiritually (...) does it or will it ever exercise the hegemony dreamt of by its sponsors and animators”. The idea of rejuvenating the international influence of renaissance Sorbonne, “and at the same time of establishing an international university campus, or rather, a school League of Nations”, seems to have failed in the eyes of the chronicler for two reasons: “if one part of the State’s root erred on the side of hardship or greed, the same State or society and nation, of which it is their exponent, lacked an ideal that was able to gather, under the same flag, the new universal generations”. The lack of financial resources on the part of the French government to fully accomplish the ambitious project, added to the unmeasured zeal of its programme to enhance its cultural and political influence abroad, coupled with its imperialistic diplomatic exercise caused the *Cité Universitaire* to emerge “weak in spirit and lacking this young animal sap that simmers beneath the models of North American foundations”. But there is even more: Daranas bodes “a vegetative life, a rotation in mediocrity and anaemia” to this Genevan LN miniature, this LN of the students (Daranas, 1935, p. 6-7). Despite all, modernity was, at that time, a synonym of scientific progress and avant-garde, and the *Cité Universitaire* still appeared to be dreaming about it in 1935.

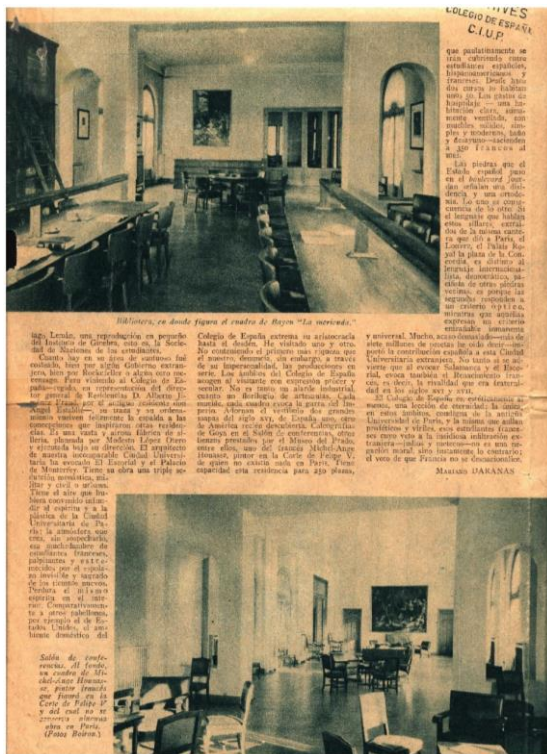
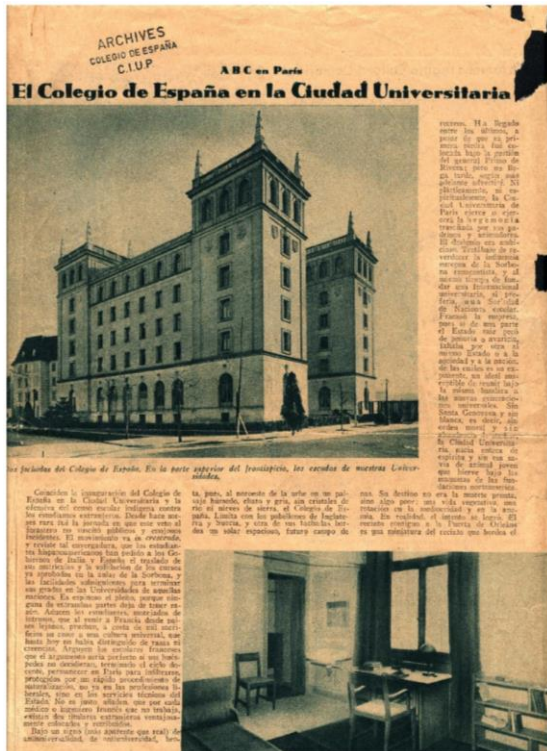


Figure 3. The Spanish Press echoes the inauguration of the Colegio de España in the Cité Universitaire de Paris (1935). On 10 April 1935, Mariano Daranas publishes an incisive report in ABC on the details of the inauguration of the Colegio de España in Paris and the international university scenario of those years (1935, p. 6-7).

Sadly, if we take into account the events that blighted Spain and the whole world some years later, perhaps we can speak of the failure of the LN and its peace ideals. When we consider the shallowness of all these pacifist ideas with which they wanted to build a better society, we can assume the lack of meaning of an institution like the *Cité Universitaire* of Paris, and its particular idiosyncrasy. Nevertheless, and beyond the frustration that the Spanish Civil War and Second World War brought with them, or the many discourses that were not so ideal which promoted intellectual cooperation and the creation of a different university reality in the south of the French capital, the efforts of those scientific, artistic and individual intellectuals as Mercier pointed out in the eighteenth century when imagining the Paris of 2440—were a true triumph, the great victory and force behind the progress of society, life, this world of ours. Some achievements, according to the author, are largely due to the eventful enterprise of individual men and women, dwarves at the shoulders of giants, but also, in our opinion, due to the support of international policy and their governments which, in the 20s, were able to create environments that fostered the development of the arts, letters and science, such as the *Colegio de España* in Paris particularly, which has just commemorated eighty years of a trajectory, and the *Cité Universitaire* in general, which will soon celebrate a century of existence.

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# **MODERN SCHOOL INSTITUTION AND EDUCATIONAL WRITING**

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## **ABSTRACT**

The modern school institution has shaped the education–institution. The construction and institutionalisation of the school have reflected institutional representation and modelling. School configurations have included symbology, materiality, curriculum, standards and pedagogy. Written culture, as the rational, method and order in the way of thinking and acting, has given support and meaning to the institutional representation of education and the school. It has enabled institutional schooling to correspond to education–institution in the modernisation of western society and within the context of the main reform movements. School reforms were changes in education. This essay presents a summary of the history of the educational institution and the representation of school. The structure of basic education accompanied the vernacular and was institutionalised through primary school. Secondary schooling was rooted in collegial tradition. It benefited from the Enlightenment Reforms of *Minor Studies* and the curriculum adjustment to new lettered profiles of the industrial revolution and the modernisation of public administration. Institutional theories are taken as the main epistemic framework.

## **KEY WORDS**

Education–institution; School institution; Institutional schooling;  
Educational writing; Secondary education.



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# Modern School Institution and Educational Writing<sup>1</sup>

*Justino Magalhães*

## WRITING AND INSTITUTION: REPRESENTATION OF EDUCATION

Writing and institution are representations of education. Institutional education, represented through educational schooling, incorporates tradition and orality and may be transmitted through gesture, the body and symbolism. Educational schooling is a historical construction. As the nucleus of modern institution-education, constitutive of the dialectic between education and writing, educational schooling has been documented in written, archival and museological sources and in a variety of memories, traditions and symbologies.

The educational institution has gained a basic, cultural, methodical, formative and organisational structure through writing and pedagogy. This structure, crucial to the individual and society, has provided support to memory, regulation, dissemination, transmission, permanence, reproduction, replication and creativity. The modern school institution represented and became central to the institution-education. The writing of the school institution evolved and incorporated different discursive configurations, including lexical, semantic and textual variations. The outcome of literate and lettered profiles also constituted a curricular and organisational representation of the school institution, where it became possible to distinguish lettered, humanistic, technical and professional profiles in the transition from the first Modernity.

The school institution became associated with educational, pedagogical and didactic dimensions. In the evolution of institutional schooling, transformations have occurred in the material, socio-cultural, gestural, organisational and recording components.

Education, as a field of information and the constitution of the social and human, benefited from a remarkable expansion and evolution in the transition from the medieval. The Renaissance was largely concerned with the reconfiguration and pedagogy of the educational. Scholasticism, the term

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that properly translates the constitution and status of universities in medieval Christianity, brought formalism to education: a space and establishment; a curricular plan and progression by subjects; application of the writing element in the transmission, acquisition and approval of pupils. Written formalisation made the recording of contents, curricular progression and the organisation of the learning collective possible. The mechanisation of typography also contributed to a multiplication of school materials.

By incorporating the formal and didactic in the medieval transition, Scholasticism gave birth to a regulating pedagogical model, driven by guidelines, methods, ways of organising and assessing teaching, which were pursued in the Renaissance. Writing is what established educational schooling. It enabled the configuration of a pedagogical framework, the ordering of spaces, the hierarchy of duties and, at a didactic level, made textual preservation, maintenance and creation possible.

Essentially, the institutional writing of modern education was pedagogical writing. The *Ratio Studiorum* of the Society of Jesus was a strict model and its influence was prolonged over time as it served to introduce institutional schooling into study plans, method and in the reference to agents, contents, pace and ways of functioning. Educational writing challenged the imagination, ideation and projection. These features were part of the institution-education, however, by rule they were not a part of pedagogical writing.

Historically, the educational institution gave substance and meaning to educational schooling. The school was the main structure behind the rationality, organisation and development of the modern education-institution. Neither school nor educational schooling may be considered in the absence of writing.

In the long term, representation of the education-institution through the school corresponds to a sequence of historical and pedagogical frameworks which present an ideological, social, cultural and pedagogic idiosyncrasy. Historical reconstitution relies on written documentation which has varied according to the reality, forms of production, representation and addressees. In curricular, organisational, pedagogic, didactic, socio-anthropological terms, writing has provided a rationale and record. At a rational level, writing has assured projection, preservation and transformation; as a record, it has established the educational as the representation and means of institutional, ideological and axiological action, and also of prudence and the transformation of values, thinking and practices.

The universe of education-related archival and printed writing presents distinct types: educational, pedagogic, didactic. It also makes it possible to reconfigure the educational as an epistemic, conceptual, organisational and praxeological field. At an intrinsic level, teaching, learning and the use of writing have determined profiles, curricula, policies, methods, means and



teaching and training programmes. Writing is the representation of educability and is also the condition of education science. The theory, praxeology and conceptualisation of education fall under the scope of education science. The constellation of education sciences has evolved on the basis of the epistemic perspective, the cartography of the educational field, the (in)formative component and the type of writing.

As a symbology, an archive and analytical strand, educational writing is made up of writings that reflect the degree of educability, the theme, the discursive genre which vary in their form of presentation and recording, according to the addressee and the aims. Taking into account the formula and form of register, it is possible to divide into one group taxonomies, systematics, cartographies, rationalities and praxeologies; in the other, the utopic, essayistic, descriptive, argumentative, justificative and illustrative discourses.

## TOWARDS AN INSTITUTIONALIST APPROACH

The idea of institution fostered by Quintilian, in *Institutio Oratoria*, and by Michel de Montaigne, in *De l'Institutio des Enfants*, was associated with education. Dermeval Saviani points out that the concept of institution is vested with the “common idea of something that was not given and is created, placed, organised and constituted by man” (Saviani, 2007, p. 4). The institution is associated with the permanent satisfaction of needs. As education, the institution congregates “in a single manner” (Saviani, 2007, p. 4), interpretations of planning, instruction, teaching, training, method and system. Saviani reiterates that overall, “the creation process of institutions coincides with that of institutionalising activities that were formerly performed in an un-institutionalised, asystematic, informal and spontaneous manner” (Saviani, 2007, p. 5).

Quintilian had incorporated the doctrine on rhetoric into the institution, as a means of formalising the way of representing and saying. By resuming and undertaking education, the primary activity, the school consigned the institutional nature and developed a form of writing. As the concept of institution is intrinsic to education, schooling embodies discipline, quality of knowledge and speech, creation and transformation. The school would not exist if it were not for the institution and writing. The educational institution, which began with Quintilian and was pursued by Montaigne, saw an evolution in its meaning, way of representing, pedagogical plans, subjects and organisation. Therefore, the educational institution was converted into the school-institution, encompassing ideology, materiality, organisation and

power, action, permanence and change. The school institution is a totality. Its materiality and identity have concerns and decisions of a curricular, material and formative nature, attaining educational singularities. The schools-institution were characterized and transformed according to the formative model, the types of public and the pedagogic-didactic relationship.

Associated with education, the idea of institution has preserved the marks of edification and longevity. There are reminiscences of the educational institution which refer to a humanitarian and civilisational “timelessness”, however, in the medieval transition, while the evolution of a free society to a regulated and recorded society was in progress, educational schooling emerged as a lettered representation and cultural mediation.

Between the end of the Middle Ages and the second half of the nineteenth century, the institution-education was at the centre of the cultural, scientific and political movements. The Renaissance, Humanism, Classicism, Rationalism, the Enlightenment were movements of culture, science, ideology, social organisation and power, which impacted education and took institutional schooling as a representation, means and process. Modern education was established as modernisation, the goal and fulfilment of man; memory and transformation of the natural; condition and process of the social, organisational, cultural and political. The institution-education evolved to the education-school and to the school-institution.

A number of different theories have been constructed around the history of western schooling, which, in broad terms, covers the above-mentioned genealogy. Assumedly genealogical, the institutionalist theory has benefited from an in-depth analysis and expansion, but has also been subject to contestation, regarding certain circumstances and features. Another theory, whose axiological, cultural, curricular and gestural substrata rooted in the transmission and appropriation of the princely and aristocratic matrix of civilisation and western education, became associated with the studies of Norbert Elias (1991) and Max Weber (1966). More recently, this theory was re-elaborated by Pierre Bourdieu (2001, pp. 155-198).

This last theory is closer to the type of schooling referred to as the civilizing process, and takes education as the centre of modernisation, as a descending socio-cultural transmission. The organising principle is that through imitation, popularisation and participation, the cultural and educational legacy shifted from the elite and lettered and ennobled sectors to other segments of society, thus enhancing their approximation through the ascension of the latter. In the process involving acculturation, social and civil approximation and the raising of morals, written culture and the school establishment were decisive.

In western modernisation, emphasis is placed on connections and continuities between socio-cultural transmission and bureaucracy associated with record-keeping at an organisational level, which are an



educational legacy transmitted and inherited in the form of symbolic capital. Norbert Elias draws attention to the fact that historical and social structures should be regarded as products of an evolution, and that the personality formation of the human being is dependent on historical changes, social norms and the structure of human relations.<sup>2</sup> Taking a closer look at the recent past, Norbert Elias concludes that the educational institution was the generator of a “social *habitus*”. Therefore, education influenced the image of the self and the state teaching establishments were, excessively, geared “towards deepening and enhancing the sense of ‘us’, exclusively focused on national tradition” (Elias, 1991, p. 273).<sup>3</sup>

The opportunity for success and individual conscience are related to the surrounding environment, historical circumstances and education. In this sense, Norbert Elias concludes that “the humanists were among the first human groups whose personal accomplishments and characteristics guaranteed the possibility of access to prestigious social positions in the administration of the state or the city” (Elias, 1991, p. 257). Although more in-depth analyses on school action are necessary, the educational institution affected individuals and gave rise to a “social *habitus*”, which, in certain historical circumstances, corresponded to a national conscience.

Another theory associates the birth of the modern school to the random and contingent combination of two knowledge-power rationales: that of the organisation operated by the bureaucratic and ascending authority of the Modern State; the other of the pastoral, missionary and evangelisation. This theory was documented by Ian Hunter, in *Rethinking the School. Subjectivity, Bureaucracy, Criticism* (1994), by the term “social governance”, with regard to the first of the two rationales, and the term “spiritual guidance”, to the second. The construction-assertion of the Modern State and the institutionalized movements of, on the one hand, the Lutheran and Protestant Reformation, and the Catholic Reformation on the other (all associated with acculturation, conversion and evangelisation movements), set in motion the vernacular, schooling and censorship and policing processes, which extended the combination of those two rationales up to the eighteenth century, both in Europe and further afield. Marcelo Caruso does not contest this theory, however he presented a critical analysis of the chronology and grounds defended by Ian Hunter, with a contrasting, broader and more sovereign perspective of schooling, namely in relation to the conditioning of the status of the school and universities at the end of the Middle Ages. He went on to document school diversity and to emphasise the autonomy of universities in the late medieval Italian republics. He also highlighted the status of municipal

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<sup>2</sup> Indeed, this is one of the aspects that Roger Chartier stresses in the Avant-Propos a *La Société des Individus*, of Norbert Elias (1991).

<sup>3</sup> Norbert Elias, with reference to the contemporary period, believed it was possible to distinguish between a national *habitus* and identity on the one hand, and integration in central humanitarian organisations on the other, such as the UN, by influencing the “social *habitus*” with rationality means.

schools in the German principalities, under the Lutheran Reformation (Caruso, 2014, pp. 87-109). Marcelo Caruso concludes that schooling was not only dependent on advances, retreats and conversion and evangelisation conflicts: the pastoral and bureaucratic theory also took shape and gained meaning in the reaction to the decline of urban utilitarianism. Modern school was not one-dimensional: it embodied diversities and presented a complex nature.

The school institution was a reflection of cultural, economic, social and political evolution, but was also a construction and an agent. School institutionalisation was the reification of interactionism. Without opposing the above-mentioned theories with a historical syncretism, which would not be in any way clarifying, it is possible to bring the strong points of the school institutionalisation together and centre the main key ideas around the interaction between the school and modern society. In this regard, one may pick up on the study of André Petitat, *Production de l'École – Production de la Société (Analyse Socio-historique de quelques Moments Décisifs de l'Évolution Scolaire en Occident)* (1982), in which a role is attributed to the school in the production-reproduction of society.

The school, as an institution, was the focus of the long, argued essay in *L'École entre institution et pédagogie. Repenser la Réforme*, by psycholinguist and pedagogue David Olson (2005). This author justifies the need and importance of approaching the school as an institution, since the school assumes education as an autonomous and bureaucratic structure, based on a collective rationale. It is quintessentially a political and social institution, and so schooling needs to be analysed from an institutional perspective. Within the school, the institutional and pedagogical establish a dialogue. School innovation and transformation are rooted in the pedagogical as an institutional practice.

Resuming the complex of schooling, modernisation and globalisation, since the 1990s, the neo-institutionalist perspective has begun to gain force. This approach retrieves, finds and updates the schooling-modernisation relationship, picking up on the historic argument and showing, through documents and statistics, that the standardisation and globalisation of the school model throughout the twentieth century were intrinsically related to the development and convergence of economic and cultural globalisation. John Meyer (2000) systematised this convergence, frequently characterised as an isomorphic process, as an approximation of these three dimensions: access/mandatory schooling; curricula; structures and organisational field.

At a historical level, the convergence arises from the isomorphism between internationalisation and the constitution of national education systems. Since the second half of the nineteenth century, at the origin and evolution of the national education systems, the congruency obtained by modelling and regulation, among the curricular dimension, organisational field and methodology has been enhanced.





In *Tecendo Nexos. História das Instituições Educativas* [Weaving Links. The History of Educational Institutions] and, more recently, in *Da Cadeira ao Banco. Escola e Modernização (séculos XVIII-XX)* [From the Chair to the Bench. The School and Modernization (XVIII-XX centuries)], I systematised the main dimensions of institutional schooling and then went on to present and characterise the historical and pedagogical cycles of schooling in the western world: state intervention, nationalisation, governmentalization, regimentation, globalisation and diversification (Magalhães, 2004, 2010). A structure underlies institutionalisation which is composed of: materiality (time, space, organisation); epistemic rationale (scientific, cultural, technical); curriculum (study plan, way of teaching, method); audience (access, recruitment and ways of educating and leaving); status and value of schooling; educational and pedagogical ideology; educational and school memory.

The educational institution is a material, organisational and establishing institution. The totality-institutionalisation interaction configures each school as an institutional singularity, whether as an organisation or as an institution-school. The educational institutions correspond to totalities that represent and unfold through the educational field, joining the educational, pedagogical and didactic. The educational institute is cumulative in time, space, in the organisational and communicational structure, in demonstrations of sociability, in forms of interaction, in the pedagogical and curricular ideology, in materiality, in the collective and individual appropriation, and in local identity and memory.

## EDUCATION-INSTITUTION.

### RENAISSANCE, HUMANISM, REFORMATION

Louis Marin infers that education, in a general sense, is “instrumental mediation in a society and specific era between a body of knowledge and a system of values on the one hand, and a mass of individuals entering this same society on the other” (Marin, 1975, p. 206). It is about individuals with a concrete existence, endowed with requirements, needs, tendencies, expectations and potentialities. Educability and historicity are part of the same complex, bringing together the institutional and ephemeral, fulfilling different temporalities.

The institutionalisation theory is rooted in the schooling of instruction and education; in the cursiveness of education-training; in literate acculturation; in literary, scientific and technical training, internal to the literacy and lettered culture processes; in the



refinement of the human being; in the reinvention of the social. The institutionalisation of schooling converted the human being into the centre of formal education. Throughout the first and second Modernity, institutional schooling became associated with civil formalisation, citizenship, participation in the consumption and fruition of collective well-being and political democratisation. This institutional complex was referred to by Theodore Marshall in the following terms: “There is, I propose, an affinity between the sequence of institutional structures and the expansion of citizenship rights, and the two are linked through the pedagogical reach of ideas about educability” (Marshall, 1964, p. 32).

School institutionalisation dates back to the transition from the medieval and has evolved in terms of uniformity and globalisation. However, since the late 1970s, it has been threatened by cleavage, as the uniformity of the pedagogical model and institutional nucleus have proven to resist adaptation to cultural and educational diversity. The educational institution has brought together the principles of good manners, values, virtues, civility, with a rationale and symbolic, organisational and methodical transmission and acquisition structure. Correlatively, a materiality, organisation and bureaucracy have been implemented. In short, the history of school institutionalisation reflects an evolution from the education-school to the school-institution, mediated by the dialectic between the crystallisation and innovation of institutional schooling.

Émile Durkheim, main galvanizer of the institutionalist theory, related the historical constitution of educational schooling to the transition from the scholastic and the formation of universities—an evolution that is thought to have occurred between the twelfth and fourteenth centuries. The school language was Latin. The study plan was organised by subjects. The dialectic subject conferred a logical culture to the spirit, while the teaching of grammar favoured the formalisation and organisation of learning collectives. During the medieval transition, schooling of the educational institution was assured by the subjects contained in the *trivium* and *quadrivium*. When the universities were formed, these subjects were re-ordered and broadened, according to the lettered profiles, particularly for the theologians, canonists, jurists and doctors. Cultivation of the *bonae litterae* was conducted through trilingual teaching (Greek, Latin, Hebrew), and the recovery of good texts, as a source of virtue and knowledge (Durkheim, 1969).

Education as a theocracy, *humanitas*, *civitas* brought substance and meaning to the school institution. Institutional schooling was part of the Renaissance and Reformation, both Protestant and Catholic. The humanists paved the way for the temporal and urbanity, dimensions that were highlighted by the contributions of Luther, Melancton, Calvin and Erasmus.



Luther, who led a public demonstration against the dogmas and practices of the Roman orthodoxy, wrote about education and schooling; he wrote a newsletter on Christian education to the reformist Presbyterians; he was responsible for the school reform in his birthplace. Melancton and Calvin created a school curriculum based on the profile of the believers and Presbyterians who were to be educated. In *Praise of Folly* (1951) published in 1511, Erasmus criticised the society and education of his time. In the same sense, and based on classical culture, Erasmus organised an encyclopaedia formed by short sentences and thoughts (*Adagia*) that illustrated the field of education. The first publication of *Adágios* is dated 1500. In *Colloquies* (1875), designed to be read by scholars (scholarly dialogues), Erasmus gave value to the teaching of literature and cultivated themes and characters that corresponded to lettered profiles, that updated classical humanism to which they conferred a secular dimension. He also sustained that the rhetoric and teaching of languages was the basis of knowledge and that literature was a manifestation of the human sublimity. In *The Civility of Children* (1978), designed for children and adults, Erasmus of Rotterdam fostered a secular dimension to education and developed a civil and humanistic argument in defence of the school. He attributed a utilitarian function to primary school, debasing the teaching and practice of the vernacular as knowledge and communication, and as a means of civil and professional education of the new urban and bourgeois communities in the mobility process. These communities were able to acquire rules and forms of behaviour, up to then reserved to the aristocracy and transmitted by blood or tradition, through civil catechism (formed by a sequence of questions and answers on civility, good manners and pragmatics) in public and private locations.

*Utopia*, by Thomas Morus, published in 1516, developed a prose poem of an imagined republic that recreated the most virtuous of what had been cultivated by Classical Antiquity. In the republic of the Utopians, the updating and recreation of the classical legacy corresponded to the Renaissance. On a visit to Thomas Morus, Erasmus took him the first edition of *Adagia* and *Colloquies*; in return, he took the manuscript of *Utopia* that came to be published in Basel (1516). Education was a central feature of *Utopia*. It included good manners, virtues, lifestyles and philosophies, in addition to lettered and professional education. It may be said that the *Utopia* of Thomas Morus offers a positive reflection on the critical aspects of education and society that were criticised by Erasmus in *Praise of Folly*.

The cultivation of good manners and virtue had been a prerogative of the classical languages. The Renaissance corresponded to a cultural updating and dissemination of the classical in the Latin and Greek languages. Vernacular versions were also created or adapted. The mechanisation of typography was also linked to the school process. Recourse to the vernacular and the introduction of customs connected to urbanism, trade economy and

written administration made education accessible to and useful for the less distinguished social classes. School civility was a means for acculturation and social and cultural uniformisation. With an identical function, geared towards the temporal and civil, it was limited to the school in territories under the Protestant Reformation, in which the vernacular came to be the cultured language. As for the Portuguese Language, João de Barros established the link between the teaching and regulation of the Language by writing the Grammar of the Portuguese Language in the form of *Cartinha*, designed to teach children in *escolas de ler e contar* [schools for reading and counting—primary schools] (see Barros, 1971).

As Georges Gusdorf stressed, the Renaissance phenomenon “lies essentially in the order of human letters”; science, quintessentially, was the philology which, thanks to the meticulous study and knowledge of classical Latin, Greek and Hebrew “enabled access to the new cultural values” (Gusdorf, 1988, p. 22). The Renaissance culture was based on writing. It benefited from printing and the interpretation of classical texts.

#### MODERN EDUCATION AND THE SCHOOL INSTITUTION: THE NEW *PAIDEIA*

The concept of institution embodies something that is primary and fundamental, something which, since it is created and transmitted, is instituting. An inclusion principle and an apparent generality reside in institution. Quintilian, in *De Institutio Oratoria* [Institutes of Oratory], composed of 14 volumes, associated institution with education. Institution-education configured the symbiosis between the epitome of the civilisation process and the long educational programme—from the child to the adult orator (see Buisson, 1911, vol.2, pp. 1723-1725).

The work *Institutes of Oratory* was resumed, adapted and updated by the reformers of the Renaissance and of Humanism. The curricular plan served to edify forthcoming generations and was rooted in a historical, cognitive and linguistic foundation. The discursive representation of educational *gesta* and *anima*, grounded, normative and transmissible, ensured the permanence and fulfilment of the human being. The humanists extended the concept of institution to the social. The function *instituteur/institutrice* and the action of *élever/éduquer*, established in modern school pedagogy, preserved the characteristics of benignancy, edification, permanence, creation and universality. Just as it came to be translated into French, the Latin word *institution* did not lose the sense of education. In *Gargantua and*



*Pantagruel*, Rabelais used the verb *to institute* with a meaning and sense that were not restricted to education (See Buisson, 1911, vol.2, pp. 1733-1756).

In *Essays*, published in 1580, Michel de Montaigne presented the institution as constitutive and significant of the human being, given the limitations of 'human science': "in fact, I only understand that the great difficulty of human science appears to lie in the nourishment and institution of children" (Montaigne, 1969, p. 196). Education was good manners and institutional virtue. By composing *Of the Education of Children* (1585), Montaigne established that the schoolmaster should question the child on matters of manners and behaviour. This educational basis was illustrated in the following statement: "That he schoolmaster should not only ask questions on the words of the lesson, but also on the meaning and substance, and that his judgement of performance should not be based on evidence of memory, but on life style" (Montaigne, 1969, p. 198).

The Art Schools, established in the transition from the fifteenth to the seventeenth centuries in Paris, Bordeaux and other European cities, such as Coimbra, developed a pedagogical-didactic model formed by the methodical complex *ars vivendi e ars eloquens*. The school curriculum was rooted in the grammatical-dialectic relationship, as cognisant rationale and formulation of thought (rhetoric). Functioning as a boarding school, it assured a comprehensive humanistic education, which also included a technical component. Whether in a school or domestic regime, two perspectives were in opposition in the pedagogy of humanist studies. One focused on the use of compendia given to readers-mentors who rehearsed and put into practice a teaching activity applicable to the pupil collective. Another pedagogical perspective favoured the selection of authors and texts, given as a model, in individualized processes, under the supervision and authority of illustrious schoolmasters. The mechanisation of typography, associated with the demand for instruction on the part of the communities (urbanized or ennobled, aspirers to bureaucracy and the financial and trade movement), favoured the industrialisation of teaching and the expansion of the school model. Over time, the school model accommodated full and part-time boarders. Both these systems involved co-funding on the part of the pupils.

Sixteenth century humanism was a synthesis of education and culture. The literate and lettered curriculum, created by the Protestant Reformation, the humanist profiles of the Schools of Humanities and Schools of Art, the Pedagogy of the Jesuits, structured in the *Ratio Studiorum* were institutional versions of a new *paideia*. It was education-institution. Education presented the broad spectrum that reached the individual and society. It included the cultural and pedagogic and, by rule, was contextualised and served as an institutional action.

The Society of Jesus, founded in 1542, and established in all Christendom within a few decades, combined missionary and teaching. The educational nucleus of Jesuitism brought together the *Spiritual Exercises*, the *Constitutions* and the *Ratio Studiorum*. The *Spiritual Exercises*, referred to as such by dint of analogy with the corporal exercises, were challenges and inner trajectories meant to be conducted by the learner-apprentice, enlightened by reading and writing, and duly supervised by a spiritual director. It was an educational internship based on information, pedagogical mediation, transformation (conversion). The *Constitutions* contained an educational programme formed by the sequence of individual experiences that were supposed to be accomplished by those accepted by the Society. The fourth part of the *Constitutions* presented both the pedagogical and curricular framework and the formative and evangelizing ideology of the Company. The *Ratio Studiorum* was the pedagogy; it contained the order of studies and the curriculum. Establishing an (in)formative, cognizant and lettered complex of comprehensive and progressive learning, the *Ratio Studiorum* articulated the pedagogical and didactic components. And so the school institution emerged as a representation of the education-institution.

Due to their strategic position in the economic and financial landscape, for the urban and republican tradition, the erudite and cultural legacy, the Italian cities, particularly Florence, were cultural, school and editorial centres of attraction and knowledge dissemination. Classicism journeyed from South to North, while scientism and encyclopaedism preferred the Centre-North, and took an inverse path.

In fact, idealism and the polytechnic spread from Central Europe, namely by initiative of the German principalities. Sponsored by Prince Louis d'Anhalt Kötlen, the philosopher and reformer Wolfgang Ratichius, who cultivated the doctrines of Luther, directed a model school and published a pedagogical work in 1618 which included a universal (school) encyclopaedia in German, Latin, Greek, Hebrew, French and Italian; a reading book in German; a Latin grammar; a Greek grammar; philosophical treatises. The pedagogy proposed by Ratichius (*realshule*) brought together intuition and the lesson of things. The study plan included languages and mathematics. Teaching was meant to begin in the native language; focus on actual "things"; be conducive to experience; enable induction, as the superation of adorned knowledge (See Buisson, 1911, vol.2, pp. 1738-1739).

The education-institution marked the common, the transversal and also the unique among peoples and nations, giving foundation to the civilisational. Published anonymously in 1721, the epistolary novella *Persian Letters*, by Montesquieu, was a collection of writings from between 1711 and 1720. Among other matters, in those letters Montesquieu commented on education, pointing out, acknowledging and comparing civilisational characteristics (uses, customs, habits, lifestyles, tastes) between France and



Persia. Associated with education, a recurrent theme in those *Letters*, was the status of women. Referring to the “pouvoir tyrannique” [tyrannical power] of men and to the “empire naturel” [natural empire] of the beauty of women, Montesquieu observed that the latter was spread across all countries and that the men would do anything to crush the courage of women. He concluded, however, that “the forces would be equal if education were also equal. Let us verify that education has not weakened talent; and we will see if we are as strong” (Montesquieu, 1828, p. 89).

Education ensured understanding among citizens and peoples from different geographical, cultural and civilisational settings. Some of those *Letters* alluded to erudite education, on the basis of the lettered to the role of the libraries of the magistrates. The *Persian Letters* contained an approximation to the education-institution.

In the Preface of *The Spirit of Laws*, published in 1748, the same Montesquieu informed that between 1728 and 1731, he conducted a tour of Austria, Hungary, Italy, Holland and London, under the conviction that historical inquiry and critical comparison were the systematic of the common, the uniform, the changeable and the conventional. He investigated and travelled to observe the institutions; to learn their laws; to infer motives and principles of action. As he refers, he did so, driven by the following belief: “I have examined men, and I have been convinced that, in this infinite diversity of laws and customs they have not been solely driven by their fantasies” (Montesquieu, 1979, p. 115).

He revealed that the first principle he observed was that individual issues remained closed within themselves. He concluded that the histories of nations were no more than consequences and that each specific law was connected to or dependent on another more general one. Each state governed itself in line with the political system adopted, which although not pernicious, since there were beneficiaries, inhibited proposals for change and led the impaired to ignore themselves. In the face of this critical situation, Montesquieu proclaimed, once more, the value of education, a matter he returned to in several stages of *The Spirit of Laws*. Montesquieu mentioned that, through general instruction, coupled with the political regime, education and human constitution are obtained, as “it is the aim to instruct men, to be able to practice this general virtue which includes the love of all” (Montesquieu, 1979, p. 116). If, in the monarchies, education can be geared towards honour and if, in tyrannies, individuals tend to merge with the government, in the republics, education is the condition of virtue, since “political virtue is the renouncement of oneself, which is always a difficult thing” (p. 160).

Thus, as should be reiterated, in *Persian Letters* and, more specifically in *The Spirit of Laws*, Montesquieu observed that the education-institution was part of societies and States, and was more than a consequence. It referred to collectives and individuals. Education ensured the preservation of customs

and human fulfilment: it was the condition of equality and the means for the functioning and renewal of laws. The singular was generalised through education. Knowledge, virtue, nobility, civility were components of education and obtained through education.

Pascal had also referred to education as second nature and Descartes had admitted the educational virtues of the institution: “a good institution is highly important to remediate defects from birth” (Buisson, 1911, p. 852). La Chalotais, who was also author of a French State Education Plan in the period immediately after the Revolution of 1789. Also admitted that “if humanity is capable of a certain degree of perfection, it is through the institution that it may be obtained” (Buisson, 1911, p. 852).

## THE MODERN SCHOOL INSTITUTION

The modern school institution was the visible component of education. It was in possession of materiality, structure, records and symbolic power. According to Louis Marin with regard to the underlying principles of Port-Royal, the main role of the school, and particularly the boarding school, was “to establish another world” which was not merely pedagogical. With a life of its own, detached from the exterior and assuring survival of the interior, the school was a model that made visible what real life camouflaged. The pedagogical closure was the main mark of the ideological gesture of representation, one that was transforming and substitutive (Marin, 1975, p. 212).

As already mentioned, it was through the *Ratio Studiorum* that the Jesuits organised a vertical school curriculum, focusing on the school as an organisation-school and taking Latin at the school language. Full and half-boarders were admitted. The core of the Study Plan was classicism and corresponded to the *Estudos Menores* [Minor Studies]. The subjects fell under the logic of the course. The primary schoolmaster was expected to monitor and refine the writing of the pupils who were already attending Latin Grammar, in addition to preparing new pupils for admission to the schools. Each school had its own duly selected premises which were carefully adapted with classrooms, library, government bodies, pupils’ records and its own budget.

The school institution was a part of Catholic and Protestant Europe for which, among other historical information, the encyclopaedic, realistic and intuitive pedagogy implemented by Wolfgang Ratichius has already been mentioned. Jean Amos Comenius, whose magisterium and written work date back to the second and third quarters of the seventeenth century, reacted to scholastic classicism by creating a comprehensive school from





the primary stage. The study plan was progressive and encyclopaedic. By following a pedagogy inspired by nature, the curriculum included observation and presented a concrete progression towards the symbolic. Studies were meant to depart from the child and in the learning of vernacular language. Latin, as an erudite language, was studied later. Curricular progression began with the observation and denomination of things and places, moving on to numbers and classification, in order to reach, with knowledge and maturity, the symbolic and abstract. Made up of philosophical *pampedia*, and cultivating a method that would enable the teaching of “everything to everyone” (Comênio, 2006), the school was essentially designed for young children and youths, and became constitutive of thoughtful, cognizant and technical reasoning. The vernacular languages, English, French, German and Portuguese, would be taught from a utilitarian perspective, like mother-tongues and as an introduction to learning and the practice of Latin.

Grammatization of the vernacular languages benefited from the works developed in Port-Royal, for a universal grammar. With the Jansenists and Oratorians, in the transition to the eighteenth century, the small schools were structured, conferring priority upon education, the norm and vulgarisation of living languages. In modern Europe, school and non-school literacy was restricted to the vernacular which, in Protestant Europe, was also the language of religious worship. Lettered education included a general and purified component. In the late seventeenth century, Rabelais, a defender of erudition in education, had already differentiated general language and art education (through compendia and selected texts) and erudite education (based on whole written works and the culture of the classics). In his opinion, erudition corresponded to a new lettered profile and came after general education. The teaching of sciences, material that was part of the curriculum proposed by Comenius, bestowed a realist feature based on comprehensive education upon the school.

In the transition to the eighteenth century, the term school was not used uniformly. Interpretation of the school-compendium, orderly and teachable, based on a method and restricted to the supervision of a schoolmaster, was established in the title of didactic works, such as *Escuela Universal de Literatura y Aritmética* [Universal School of Literature and Arithmetic], by Diego Bueno, Examiner of Maestros in Zaragoza, published in 1700 (See Domínguez Cabrejas, 2009)<sup>4</sup>, and *Nova Escola para Aprender a Ler, Escrever e Contar* [New School to Learn, Read and Count], by The primary school master Manoel de Andrade de Figueiredo. It is highly probable that the latter was published in 1722, although some copies were available before this date. It was composed of four treatises, including prints and application exercises.

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4 The full title of the work is: *Universal School of Literature and Arithmetics* which is dedicated to the Angelic Doctor, Santo Tomas de Aquino (Fifth Dr, of the Church) Diego Bueno Examiner of Maestros in Zaragoza.

Given that it balanced method and encyclopaedic compendium, the designation school was used in pedagogical and didactic books and interpreted as comprehensive education. This was also the case in *Escola Nova, Christã e Política* [New School, Christian and Political], published in 1799, by Leonor Thomasia de Sousa e Silva. In addition to school literacy, composed of an introduction to reading method, this book contained the Christian doctrine; rules on civility and urbanity; geography of the world; the chronology of Portuguese dynasties and monarchs.

From the late seventeenth century, interpretation of the school as a collective of learners (pupils) became common, even in the domestic school system. Progressively, with the regulation and inspection requirement on the part of the religious authorities, civil authorities and for pedagogical recording purposes, the complex of curriculum, method, schoolmaster, book, suitable installations and learning group became an underlying component of the concept of school. Although not exclusively, the school became adapted to the child-youth age group. Correlatively to the formalisation of the school book, configured in the form of a compendium, and using standard and assertive discursive methods, specific to didactics (such as the sentential, catechismal, exercitation, application and verification), new types of texts and books emerged in the field of education. They were textual creations that cultivated new types of text which, without compromising the formal virtues and intentionality, made use of the imagination and creativity to draw in and motivate the reader. Among other resources, new forms of writing, saying and reading were favoured by use of the imaginary and fantastic.

Fénelon who, in the very early eighteenth century, was preceptor and schoolmaster of the Duke of Burgundy, future king of France, practiced collective teaching in a domestic setting by grouping together other grandchildren of King Louis XIV. The writing and school use of the *Adventures of Telemachus* date back to that experience. This text, in the form of a novel, was composed to facilitate the teaching of culture and classical mythology to the prince and future King of France. Fénelon took up the epic of Telemachus, son of Ulysses, and composed a sequence of short narratives specifically for that group of children. By reading them and making the children recite them by heart, Fénelon took note of the opinions and observations of the children, with a view to improving the texts.<sup>5</sup>

The convenience of teaching a pupil collective and by bringing together the didactic and fantastic text was assumed by Martinho de Mendonça, in the Prologue to *Apontamentos para o Ensino de um Menino Nobre* [Notes on the

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<sup>5</sup> Written in French, this book was first published in Amsterdam in 1715, without consulting Fénelon. From then on, the book was translated and adapted for other languages and became part of the school bibliography up to the school Reforms following the First World War.



Teaching of a Noble Child], which was written by him and published in 1734. He presented the advantage of collective teaching in the following terms:

Although I recommend a different method of teaching the Latin language to a Noble Child in his home, I would not dare reproach what is commonly used in state schools, and proven by experience, that for a single schoolmaster to teach many disciples of different geniuses and age, is the most comfortable form of teaching (Proença, 1734, n.p.).

As was the case with the afore-mentioned *Nova Escola para Aprender a ler, Escrever e Contar*, collective teaching was frequently interpreted as an adaptation of preceptorial teaching. With a schoolmaster, a specific place and schedule, the small parochial, episcopal, philanthropical and association schools were locations for the rehearsal of collectivisation methods. The *Petites Écoles*, created by the action of Jean-Baptiste de La Salle, and the schools of *Les Frères des Écoles Chrésiennes* emerged throughout the French territory. The school model was also used in British territory and in the German principalities. Collective teaching, with recourse to decurions and monitors, enabled the implementation of shared and gradual teaching possible. Records were kept, and inspections carried out on these schools by the religious, civil and community authorities. Record-keeping benefited the standardisation and transversality of new teaching methods.

The school model, up to the then habitually applied to the Minor Studies (inspired by classicism and composed of *trivium* and *quadrivium* subjects), gradually extended to the Fine Arts and later, also to military education. The plan presented by John Milton (1895) in *Tractate of Education*, published in 1644 should be noted for military education. Designed to meet the needs of 50/100 pupils, the proposed academe was intended to have an ample-sized, multi-functional space. The day of the boarders would be divided into study, exercise and meals. The school language would be English. In Milton's opinion, the proposed educational model brought together the military and the monastic.

Comenius, as already mentioned, who developed a method for the teaching of the Latin language and also structured teaching in the vernacular, left a plan for schools. Ratichius also created a teaching method in the vernacular, divided into school groups, and was the author of school manuals. Both turned the school into an environment of knowledge, humanisation, citizenship and progress.

The school model was gradually adapted to the different teaching methods and different receivers. The school institution benefited from the curricular, methodical and organisational methods, but was essentially a

product of record-keeping and typographical printing. In fact, collective teaching and school vulgarisation are associated with mechanical typography, which made the multiplication of printed matter and school manuals possible.

In the transition to the eighteenth century, primary school was essentially rooted in the collective teaching method, in a selected and adapted space, a curriculum (literacy in vernacular, Christian doctrine, civil precepts), a schoolmaster, and an age group. However, as had been conceived, written and organised by the humanists and modern reformers, the school institution was a material, organisational, curricular and symbolic complex, made up of written information, the educational *gesta* and pragmatics. This complex took root in a textuality and corresponded to a cognizant, scribal and civil literacy. The idiosyncrasy between schoolmaster and pupil bestowed charisma on the schooling profession.

Georges Snyders concluded that the modern reformists paved the way for synthesis which superimposed method, the book and the school curriculum (Snyders, 1971, p. 321).<sup>6</sup> Pedagogy and curriculum ensured that, having experienced learning and schooling, the human being would turn into a virtuous and useful citizen. The school model, particularly as a progressive curriculum, collective education and collegiate organisation (traditionally applied to lettered and clerical education) expanded to encompass technical and professional, artistic and military training. The boarding school boosted the institutionalisation of the school.

## THE SCHOOL INSTITUTION AND THE REPRESENTATION OF EDUCATION

The school institution represents education as the institutional, the ordered and experiential space, the theoretical curriculum and practices, schoolmaster, method, writing. The school was heteronymous and alternative. This complex was formed in the eighteenth century. In *Émile*, Rousseau recalls the distinction among education, institution and instruction, to which the governor, preceptor and schoolmaster respectively correspond. However, he also points out that these distinctions are not very explicit and, in order for children to be well guided, they should only follow one guide (Rousseau, 1969, p. 88). Furthermore, Rousseau himself refers to the education intended for *Émile* with the expression “mon institution” (Rousseau, 1969, p. 271). By the end

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6 Georges Snyders produced a historical and pedagogical synthesis of the birth of the traditional school, however it is not possible to elaborate on its fundamental arguments here. The meaning of the modern school institution is the object of study of Louis Marin, in which the boarding school is one of the subjects referred to (Marin, 1975, pp. 205 ff.).



of the eighteenth century, the school complex had already been formed. In effect, by order of the Dean of Coimbra University, Jerónimo Soares Barbosa, applied a survey to the Primary Classes and Schools of the Dioceses of Coimbra, which was composed of items on the space and location of the school, qualifications and standing of the schoolmaster, method, good manners, pupils' attendance, performance and the relationship of the school with the local community (see Magalhães, 2010, p. 148).

The small schools and boarding schools had spread across Europe and America, not only Catholic but also Protestant institutions. The Enlightenment became associated with schooling. In the mid-eighteenth century in Scotland, where cultural, economic and political development had rapidly developed, a considerable percentage of merchants, able to read Latin and Greek, "the heirs of firms (...) regularly went for one or two years to the university" (Herman, 2001, p. 165). By integrating the school component systematically, the Reform movement moved forward into the second half of the century.

In Portugal, the first half of the eighteenth century was marked by a significant debate on the scientific representation and participation of the Jesuits in education. As with former Congregations, the Jesuits proceeded to update the method of knowledge and science, which had an effect on pedagogy. The Oratorians, to whom King John V gave protection, implemented schools and created vernacular manuals. In the mid-eighteenth century, the Minor Studies reforms were under way, which preceded and opened the way for the reform of the University of Coimbra. Following the fall of the Jesuits, these reforms affected the study plans, contents, methods, compendiums and exams. In view of the verticality of the studies, which culminated in the preparatory schools (with the possibility of continuing on to university), curricular reforms involving the institution-education in a total sense were implemented.

Schooling became associated with the Enlightenment, as well as the British Industrial Revolution and the Political Revolution which extended from France to Europe and America. These large movements consolidated changes of a didactic and pedagogical nature, establishing them in the school reforms.

In Portugal, the Marquis of Pombal's Educational Reforms, which began in 1759, covered the different educational segments: Primary School, Minor Studies (including the teachings in the Congregations), professional training and the University of Coimbra. The school structure was broadened to artistic, agricultural and technical training. When the College of Nobles was created, the collegiate model was also applied to military training, resuming the boarding school model, practiced in other locations, and, at the time, re-written for the

Portuguese context by Ribeiro Sanches in 1759, in *Cartas sobre a Educação da Mocidade* [Letters on the Education of Youth] (see Sanches, 1922).

Associated with religious, cultural, political and social changes, the school institution was at the root of the political and administrative reforms. In North America, the school institution had been part of the model of establishment, colonisation and missionary since the late seventeenth century. The municipalities and communities of the settlers created schools and colleges. There are references to an intense production of school manuals in the English language. The Liberal Revolutions and the constitution of the Nation-States are unthinkable without literacy and schooling.

In the eighteenth century transition, the school institution was a model and means for evolution, and new gnosiological and pedagogical perspectives, reflecting epistemic changes, were in progress. The teaching of science bestowed a realistic feature on the school and was close to a comprehensive type of education. The encyclopaedia and vernacular dictionaries compiled and popularized scientific, humanistic and technical knowledge. Giving a foundation to education, chronology, geography and history broadened the horizons of the school culture and depicted the human epic as a scenario and evolution. Education and instruction regarded universal history and the history of peoples as the foundation and grounds of the emerging Nation-States. Written, school and educational production was boosted by monumental works such as *Discours sur l'histoire universelle* (1822) by Jacques Benigne Bossuet, who associated divine determinism with the prerogative of History the teacher of life. In his comments on the topic *Historia magistra vitae*, Reinart Koseleck (2005, pp. 36-62) admitted that it contains, for the Enlightenment, an approximation between history and education. Exemplariness gave rise to reservations on the part of the sixteenth century authors Jean Bodin and Michel Montaigne. While the former sustained that the formality of history makes it possible to identify deviations, Montaigne expressed reservations towards its generalisation (see Debesse, 1971, pp. 191-265). The educability of history led to the distinction between narrative and event history and, more appropriately, between history and the “fantastic”.

Educational schooling was, to a considerable degree, a product of history and education. History made it possible to reconstitute evolution and contrast the former and the modern. In 1687, Bernard de Fontenelle presented a brief treatise at the French Academy, of which he became a member, entitled “Digression sur les Anciens et les Modernes” [Quarrel of the Ancients and the Moderns], where he established a link, but also a contrast, between Classical Antiquity and Modern Times, resulting from an advance in resources and from the historical and human accumulation of knowledge. He



assured that “a good cultivated mind is, so to speak, composed of all the minds of the preceding centuries; it is no more than a same mind that has been cultivated over all this time” (Fontenelle, 2001, p. 307).

Civilisational, national, human and natural history was the observatory, inquiry and lesson. In the late eighteenth century, Immanuel Kant, writing on history in *Opuscule sur l’Histoire*, considered it possible to identify the broad lines of the game of human freedom and will, by seeking regularities which, at an individual level, appear to be irregular. He argued that by fulfilling their aspirations, men do not merely follow their animal instincts, like rational citizens, they make use of the broad lines of a development plan (Kant, 1990, pp. 69-70). According to Kant, the idea of a political constitution in keeping with the natural right of men is what underlies humanity, since men ought to obey laws. He concluded that to legislate is at the root of all political forms (Kant, 1990, pp. 218-221). Progress and education preserve and enhance this harmony through reforms. History is constituted by such evolution.

The Kantian legacy of the harmony between the human and writing of the historical complex was the source of inspiration for the nineteenth century school curriculum. Within the scope of the French Revolution, Condorcet, member of the French Academy and sympathizer of the Convention, presented a plan for state education (1791-1792), in which he stressed the importance of the teaching of human and natural history (see Condorcet, 2008). He developed a historical and teachable synthesis, based on the “progress of the human spirit” - *Esquisse d’un Tableau Historique des Progrès de l’Esprit Humain*, a posthumous publication (see Condorcet, 1988).<sup>7</sup>

Exemplariness as a pedagogical resource was also explored through the “fantastic”, which enabled the inventive and imagined configuration of integrated and intentional school narratives. The precise use of the imaginary made it possible to attribute meaning and to reorient the human and civilisational epic. In this context, the afore-mentioned educational novel *Adventures of Telemachus*, written by Fénelon is worthy of mention in the quality of preceptor of the future King of France. Fénelon recreated a fictional narrative in which he criticised and followed on from the *Odyssey* while simultaneously interweaving critical judgement of the reign of King Louis XIV and enunciated new governmental principles. As already mentioned, this fully translated or adapted novel went on to become part of the readings for schools and adolescents in the vast majority of countries. Fénelon also bequeathed a *Treatise on the Education of Daughters*.

Another educational work, *The Adventures of Diophanes, imitating the highly sagacious Fénelon in his journey of Telemachus*, also falling under the scope of the fantastic, was written and recasted in the Portuguese language. Written by Alexandre de Gusmão, under the pseudo name Dorothea Engrassia

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<sup>7</sup> The synthesis on the history of the human spirit retrieves Turgot, in *Encyclopaedia*. This work was only published in 1795, after Condorcet had already been arrested and sentenced to death.

Tavareda Dalmira, this text was published in 1777, in both Portugal and Brazil. Member of the Society of Jesus, born in Brazil to which he returned to become Bishop of Pernambuco, Alexandre de Gusmão had been secretary to the Portuguese Ambassador in Paris in the Regency period. He socialized with Fénelon there, whose political failure he closely accompanied. The fictional narrative, *The Adventures of Diophanes*, is a feminine replication of the Telemachus epic, containing dialogues on the situation of women in their family and religious settings and love lives. In the Prologue (Gusmão, 1777), recourse to the “fantastic” is justified in the following terms:

One of the flaws that some may encounter in this work is the fantastic idea, while simultaneously applying the true story; to which I reply that the Spanish, French and Italians persuaded me of this method as they deem it to be the most effective; and since I know nothing of Greek, and barely understand the other languages, in order to avoid begging for old pieces of news, or risk lying by error, I resolved to follow the course of this idea in which the events and fantastic objects, but not the essential, lead to the best ending. (n.p.)

History in the form of romance served the pedagogical cause, making it possible to recreate events and objects and to order them for the desired purpose. John Locke had already distinguished between the short narratives written for didactic purposes and the educational dimension of History. This distinction, also later referred to by Jean-Jacques Rousseau, was developed throughout the eighteenth century.<sup>8</sup> In the afore-mentioned study plan he presented to the Convention, accepted fictional books and stories as a way of recreating natural history, of providing children a denomination and characterisation, a moral sense (Condorcet, 2008, pp. 113 ff.).

The institution-education looked upon pedagogy as a combination of method and order, as it recreated humanistic and scientific knowledge, according to the purposes and audiences. Pedagogy ensured a conciliation between realism and humanism within the school setting.

Educational schooling was a stipulated representation adapted to the written universe. In the constellation of the knowledge of writing, the school book took on a specific configuration and status. In the eighteenth century, encyclopaedias were published in Britain and France, which compiled and systematized the various fields of knowledge. These vernacular encyclopaedias served as a support to the curricular reforms and to the architext formed by the school culture. In Portugal, the Educational Reforms of Pombal, which had led to the implementation of state schools, a school

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<sup>8</sup> In the second half of the eighteenth century, the German language adopted the term *Geschichte*, which covered both the narrative and the event (see Koselleck, 2005).





proto-system and curricular verticality, moved forward through the turn of the century and well into the early nineteenth century, expanding the school network and making the University of Coimbra responsible for the supervision of education throughout the country.

Within the context of the French and Western Revolution, in Portugal as in Europe and America, the school institution benefited from successive reforms of study plans in Education and general Instruction. In France, the Convention consigned the idea of standard education in the training of teachers. An institutional sense of national citizenship and rules was attributed to primary education. The University was called upon to supervise education. In the transition to the nineteenth century, the period of peace following the fall of Napoleonic imperialism created an eclecticism in the ways of learning and thinking. The school culture was recreated as a nucleus of classicism, science, technique and vernacular languages. This neoclassic and transnational legacy was progressively adapted and in line with the national traditions and cultures.

The Enlightenment, as a movement of written, scientific, cultural and political acculturation, geared towards progress, established the link between the Educational Reforms (covering secondary, professional and technical education) and preparatory education for entry into University and University Education. Primary School was transformed in the meantime to elementary education; literacy, acquired in the school context, was obtained in the vernacular, as basic communication (mother tongue), integration and an introduction to the culture of the homeland, citizenship and religion. The school-modernisation binomial resumed the internality, complexity and functionality of the school-institution as access, standard, profession and field of writing. Written acculturation was an example of modernity associated with the Nation-State and the political, social and cultural revolution. At a historical and pedagogical level, the schooling of elementary education was guaranteed by the mid-nineteenth century, and the vernacularisation, establishment of state schools and curricular nationalisation processes culminated in the virtuosity of universalisation, the recording of pedagogy and a standardisation of didactics.

Having attained this effect, the nineteenth century became renowned mainly for the constitution and institutionalisation of secondary education. The Enlightenment Reforms and, later on, the convulsions and conventions of the revolutionary period were replaced by neoclassicism and a syncretism of eclectic inspiration. In the second half of the nineteenth century, secondary education benefited from intense national and international debates, opening up to comprehensive education and curricular essays which brought together humanities, science and technical and professional education. Administered by secondary school, the heir of liberal education or, alternatively, obtained through technical, artistic and professional

training, secondary education was supposed to have a humanistic and scientific core curriculum and a technical and professional differentiation.

Educational writing had been promoted in its different branches. Henri Pestalozzi, who claimed to be an avid reader of Rousseau, regarded the school as the centre of education, masterminding a structure with backward and forward extensions. In *Leonard and Gertrude: a book for the people* (1947), originally published in 1781, he resorted to the discursive novel method to write education. He recreated the renovation of a village house as the work of a schoolteacher (Gertrude). With regard to the school, he suggested and sustained that some subjects could not be taught there. The aim of the school was to stimulate former knowledge and behaviour, correlative to school learning. Analogously, there were subjects such as the *lesson on things* and the teaching of languages in which the school ought to be articulated with the surrounding community. The educational dimensions of education went beyond the school.

The histographical and fantastic narratives and the great treatises paved the way for educational writing. The curricular reforms and plans, associated with a record of schooling (on the materiality and functionality of schools, attendance of the teacher, biographical record of the pupils, their attendance and performance, statistics) constituted pedagogical writing. Access regulations and the teacher's duties, the inquiries and school inspection reports were part of pedagogical writing. The encyclopaedic and structured compendiums as a sequence to the lessons (Magalhães, 2016), frequently presented in the form of catechism or manual, gave rise to didactic writing.<sup>9</sup>

## INSTITUTIONAL SCHOOLING AS COMPREHENSIVE AND FUTURE EDUCATION

Geared towards establishing literacy, civil pragmatics and catechistic education, elementary school became standardized in the mid eighteenth century. It went on to be governed by the state during the absolutist regimes, was nationalized and mandatory with Liberalism and universalized with Republicanism. Upon organisation of the national educational systems, during the last quarter of the nineteenth century, the formalisation, uniformity and compulsoriness of elementary schools ceased to generate controversy, neither at an intrinsic level nor in the relationship between the school and society. Fundamental and basic, primary schooling determined

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<sup>9</sup> It is not possible to develop the issue of educational writing here. My detailed analysis may be found in Magalhães (2010).



an organised society and the education of the Nation-State, and was also in possession of a record-keeping professional; it was universal.

Such was not the case with secondary education, established amidst curricular, pedagogical and sociological decisions. Secondary, scientific, humanistic and technical education projected and ensured the future. Organisation of the curriculum in the form of a course and the discussion of themes (such as secularism) was agreed upon for primary school, however for secondary school it proved to be a source of contention. Hence, in *Évolution Pédagogique en France* [Pedagogical Evolution in France], which contains course subjects on the History of Teaching in France taught in 1904-05, Émile Durkheim developed “the idea of discovering how our secondary education was established and developed” (Durkheim, 1969, p. 9).

Durkheim believed that by knowing the constitution and evolution of secondary education was a way of systematizing the genealogy of the school-institution. He divided the history of pedagogy course into two broad periods: “Des Origines a la Renaissance” [From the Origins to the Renaissance] and “De la Renaissance a nos Jours” [From the Renaissance to Nowadays]. In this work, almost symmetrical in the division of pages, Durkheim interpreted the word *enseignement* as being mobile and the central concept for secondary education. At the time, this teaching approach was experiencing “A serious crisis that not for the time being has begun to ease” (Durkheim, 1969, p. 14). The crisis, dating back to the first half of the nineteenth century, was extensive to Europe and based on both internal and external factors to educational schooling. According to Durkheim, it was an institutional crisis:

Pedagogues and men of the state everywhere are aware that the changes resulting in the structure of contemporary societies, in both their domestic economy and their foreign relations, require parallel and equally profound transformations in this special part of our school system. (p. 14)

The interest in secondary education was rooted in a multiple causality, since it was at the centre of the relationship between the school and society. The crisis in secondary education focused on education and could not be resolved by administrative deliberation. The educational reform would have to involve pedagogical education which emerged “as far more urgent for secondary school than for primary school” (Durkheim, 1969, p. 15). Durkheim stressed that the fundamental component of pedagogical education was the history of teaching, given that it is acting in time that the active forces reveal their effects. The man of the moment is of no interest; the man of today will be replaced by the man of tomorrow.



The secondary school issue, central to education, included intrinsic aspects, aspects on the relationship with society, curricular aspects (the teaching of humanities, the teaching of nature) and essentially implied that the *doing* (“faire”) of each pupil was “a complete reason”. Durkheim concluded that the secondary education unit is man, as “all teaching is necessarily anthropocentric”. The humanists had not fully understood this principle. For the period up to the Renaissance, the instrumental word supporting the institutionalisation of secondary education was the term *subjects*, while for the modern period it was *pedagogy*. The type of teaching that proposes a comprehensive education should ensure a triple culture, through the most effective pedagogical means, systematized by Durkheim as: “culture for languages, scientific culture, historical culture” (Durkheim, 1969, p. 399).

The challenge involved idealizing and edifying a school construction with multi, pluri-functional spaces; structuring a multidisciplinary, comprehensive and progressive curriculum; combining liberal, moral and civil education; receiving and making a young adolescent (whose psychological knowledge was only rehearsed) develop; overlapping school, professional and vocational representation; opening the school to the new urbanized, native public or those in transit, from a small service or trade bourgeoisie, or the children of a small agricultural aristocracy. However, as well perceived by Durkheim, the training and pedagogical and didactic standardisation of a teaching professional was no less of challenge. These professionals were traditionally recruited from the lettered, a man of a curricular subject, adverse to pedagogical conciliation and the constitution of a school framework in the form of a course and learning group.

The secondary school crisis consequently became an educational crisis. The idea of the present involved primary education, which had become universal and mandatory in the meantime; but the idea of the future, at an intrinsic level and in the relationship between the school and society was through secondary education. Both, however, were grounded in the school institution.

Throughout the twentieth century, it underwent structural reforms. Neither was there any uniformity nor simultaneity of processes, however with the universalisation of primary education, the general tendency was towards a comprehensive and sequential type of secondary education. The core curriculum was a source of controversy. There were educational systems which, while safeguarding the core curriculum, maintained the distinction between humanistic and scientific profiles and technical scientific profiles. Nevertheless, institutional schooling was synonymous of comprehensive education and paved the way for the notion of future.



## CONCLUSION

Giving substance and meaning to a first and second modernity, institutionalisation of the school bestowed foundation, method and universality to the written culture; it gradually articulated the lettered profiles; it legitimised educational schooling as socialisation, access and participation; it enabled the school process and culture to become the condition for and concretisation of sociability and humanity. This complex integrated the constitution and development of the school as an institution: culture, location, time, specific to instruction and education. Between the end of the Middle Ages and the late nineteenth century, the school was constituted and educational schooling was at the core of the institution-education. The school focused on the most significant aspects of education: good manners, knowledge and behaviours. By evolving and reconfiguring itself, the school institution became tailored to the socio-cultural functions of segmentation, comprehension and diversification. Given the broad spectrum of social norms, and those of the Nation-State in particular, schooling corresponded to the technology of the social, ordering and hierarchizing individuals and citizens. Educational schooling was the performative matrix of the individual as a citizen and human person. The school passage had been prolonged and configured as content, a transforming and educational sequence. School order was the thinking and cognizing reason; school disposition and legitimacy assured social technology.

The modern educational institution was grounded in the institution-education and found substance, configuration, means and process in the school institution. The school represented an alternative model, content and experience in which the learner was constituted. Written culture was the symbolic, epistemic, scientific, technical and professional field in which rationality, thought, pragmatics and knowledge were configured and evolved. The scientific pedagogical languages gave substance and meaning to institutional schooling, making an educational curriculum and model possible. The core of this complex articulated written culture, the school, society and development. The school institution brought together different spheres at symbolic, functional and configurative levels: mandatory, cultural, curricular, pedagogical, didactic and institutional. The formalisation of writing enabled the organisation and discipline of the learning collective. In the transition from the first Modernity, access to written culture and the qualification for lettered duties were associated with the institution and culture of the school.

The education-institution refers back to the transition from the medieval, congregating customs, lifestyles, ways of thinking, knowledge and written communication. The school institution emerged and evolved, leading to humanistic written acculturation and erudition. Later, it also ensured artistic, scientific, technical, professional and military training.



These branches evolved in a unique manner and affected the interdisciplinary perspective. The institution-education gave rise to the school institution as a singularity and other world. The school institution evolved, segmenting itself, verticalizing and recreating the social, cultural and political. In the second half of the nineteenth century, the school-institution was already the total-school.

Humanism, the Protestant Reform, the Catholic Reform took the Renaissance as the basis of education, and these movements constituted institutional schooling. The structure of basic education accompanied the vernacular and was institutionalised through primary school. The universalisation of basic schooling through primary schools, made mandatory by the Liberal Revolutions and Republicanism, was an underlying feature of the Enlightenment. Secondary schooling was rooted in collegial tradition; it benefited from the *Reformas Ilustradas dos Estudos Menores* [Enlightenment Reforms of Primary Education] and the curriculum adjustment to new lettered profiles of the industrial revolution and the modernisation of public administration. Towards the end of the nineteenth century, institutional schooling had finally become more akin to the notion of comprehensive education. Institutional schooling was determined by secondary education as an organisational model composed by comprehensive education, pedagogy and architectural and curricular spaces. This idiosyncrasy is what consolidated modern school education.

Paving the way for a second modernity, the school institution corresponded to institution-education. The school institution included primary education made mandatory and universal. Secondary education as comprehensive and future education represented education and institutional schooling, combining written culture, institution, education and training; it constituted a transforming totality of the individual. With the nineteenth century, and having overcome the idea of preparatory studies and created the need for *a participative and critical citizenship*, the notion was enhanced that secondary school education was synonymous with comprehensive education, the engine of progress, constitutive of modern ethical and rational frameworks, a cultural benchmark, technology of the social, the future. On appealing to a pedagogical reform, Durkheim sought to reformulate institutional schooling in its entirety, beginning with the training of teachers. The history of modern school education is rooted in primary schooling, but gained meaning in the institutionalisation of secondary education.



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